



L-net

Evaluation and Planning Report

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I would like to thank the advisory board members, and the Service Coordinator, who worked closely with this consultant. The input they provided assured that the needs of L-net with regard to this report would be paramount.

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Additionally, appreciation is extended to every one of the librarians and administrators who participated in the focus groups. Not only were your opinions crucial in creating this document, you made the meetings a pleasure.

Donna L. Cohen, M.L.I.S., M.Ed., August, 2004



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“We now have partnerships that didn’t exist before”

Executive Summary

L-net is Oregon’s statewide collaborative digital reference service. It is a LSTA funded-project initiated in 2003 as per the recommendation of the October, 2002, report from the Oregon statewide E-reference task force to establish a virtual reference service. The name of the service was changed from Answerland to L-net in the spring of 2004.

D. L. Cohen Information Services was contracted by the L-net Fiscal Agent, Multnomah County Library, to complete an external evaluation as required by the LSTA grant. The board also wanted a third-party to recommend changes for improvement and enhancement to the service.

Methodology

A total of 25 librarians and administrators affiliated with L-net [or, in a couple of cases, valued members of Oregon’s library community] took part in three focus groups in July, 2004. In addition to the focus groups, four strategic information gathering meetings occurred with consultant, the Program Coordinator and key members of the Advisory Board. Finally, pertinent documents, including all evaluative material available, were examined by consultant.

L-net has benefited Oregon in many ways

- Library collaboration has moved ahead dramatically.
- Librarians are beginning to share knowledge on a regular basis, not just at conference time.
- The potential to advance resource sharing across the state has leapt ahead.
- L-net has laid a foundation for raising the visibility of libraries in Oregon.
- Not content to let technology continue to lure away patrons, libraries are pushing the boundaries of technology along *with* their patrons.
- New ways of delivering reference are coming and Oregon is embracing these changes.



However, there is also a:

- Lack of direction, vision, and goals to guide decision-making.
- Lack of a clear organizational and management structure for decision-making.
- Lack of systematic collection and analysis of information for decision-making

Goals and Infrastructure

L-net must develop a specific mission with actionable goals. This will not happen until there is an organizational structure that makes provision for the tasks to be done and that invests authority – decision-making power – with those who are to accomplish those tasks. To this end, the Advisory Board should become a governing council and teams created to focus on the starred functional areas listed below.

Operations and *Services

*Marketing and Market Research

*Shared Learning and Training

*Evaluation / Assessment

Focus group participants are very concerned about the lack of marketing of L-net. Then again, they are not sure what L-net's market should be nor are they sure of the goals of L-net in general. Discomfort around these issues is strong and should be addressed as quickly as possible under a new infrastructure.

Librarians are also interested in ongoing training opportunities. The software used for the chat service can also be used for training purposes. Since some librarians are concerned at not having enough practice with the software it would appear to be a natural fit to utilize it as a training vehicle.

Participants are very supportive of digital reference, although some librarians question whether the chat portion is “ready for prime time”. The minimal evidence available indicates that the public is more satisfied with its usefulness than L-net librarians.

There has not been an ongoing collection and analysis of



enough data to make the types of judgments needed to fully evaluate L-net. Formative evaluations serve many purposes and, especially, when new terrain is being crossed keeping an eye on the compass is crucial to making needed corrections.

L-net can't really "go wrong". As mentioned above the benefits accruing improve Oregon's library community whether or not the specifics of a digital reference program change. The relationships that are being built will serve the community in future collaborative efforts. Opportunities to share experiences will only yield useful information, even if that ultimately means a significant course correction. In the meantime, many policy and service issues can be addressed to ease the transition to digital reference. In this consultant's opinion full integration of administrative staff and librarians in decision-making roles and team membership is very important to moving ahead as quickly and painlessly as possible.

[The List of Recommendations follows.]



Priorities are starred.

Brackets indicate where primary authority rests.

List of Recommendations

***Recommendation 1** [Board]

A clear mission for L-net should be established with specific measurable objectives.

***Recommendation 2** [Board]

Elements of the L-net infrastructure need to be charged with specific responsibilities and powers.

- The L-net advisory **board** should become a governing board / council.
- The role of the L-net **fiscal agent** should be more clearly defined.
- Include front-line librarians on the advisory board.
- **Establish the following teams.** Have members of the advisory board become members of the various teams and/or have librarians appropriate as teams leaders join the advisory board.
 - **Assessment / Evaluation** Oversee that all required data is collected, synthesized and produce quarterly data reports.
 - **Market Research / Marketing Team**
 - **Services Team**
 - **Training Team**
 - **Service Agreement Team** [temporary]
- The **Service Coordinator** should monitor and nurture the teams, facilitate opportunities for communication and collaboration among stakeholders, and actively participate in marketing efforts.

Recommendation 3 [Service Coordinator]

The Service Coordinator is encouraged to share information in a more systematic manner with all stakeholders about L-net developments and significant changes in the VRD community by way of the listserv, a blog and/or email newsletter. It is the responsibility of the Program Coordinator to nurture this communication.

Recommendation 4 [Evaluation Team]

Provide data needed by administrators for funders

Recommendation 5 [Services Team]

Explore appropriate roles for academic, public and school libraries



and whether a tiered reference system is needed.

***Recommendation 6** [Services Team]

Among participating L-net libraries, determine librarians and collections that can provide specialized knowledge.

Recommendation 7 [Service Agreement Team]

Include requirement of utilizing individual entry points into the new Service Agreement.

***Recommendation 8** [Marketing Team]

Initial target markets must be identified.

***Recommendation 9** [Services Team]

Create a process for categorizing email and chat content to provide clues as to what the current user-base looks like. Include categorization of subjects of questions. This can also be the first step in describing the subject specialties for which experts and special collections need to be identified.

Recommendation 10 [Evaluation Team]

Consider adding criteria to the web forms which help identify the user base and their interests more clearly.

***Recommendation 11** [Marketing Team]

Create a plan for marketing [include presentations and hands-on demos] to:

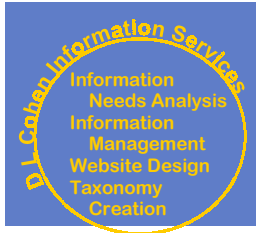
- The public
- Provider funders

Recommendation 12 [Training Team]

Fully utilize the software features in providing training.

***Recommendation 13** [Training Team]

Utilize the new training staff person to coordinate and direct training



arrangements, and to facilitate collaborative online [and some physical] training meetings, not, primarily, as a person who trains others.

Recommendation 14 [Training Team]

Provide training opportunities that are frequent utilizing the concept, as one librarian put it, of “mini-ongoing trainings”.

Recommendation 15 [Training Team]

Establish ongoing transcript analysis as per Recommendation #9 as well as for digital reference quality.

Recommendation 16 [Service Agreement Team]

Require participation of partners in L-net evaluation efforts written into the Service Agreement.

Recommendation 17 [Evaluation Team]

Data *collection* can be shared between Evaluation Team members and appropriate other L-net teams. For example, the Services Team for user satisfaction data and transcript analysis, the Training Team for training surveys, and the L-net Program Coordinator for demographic data. The Evaluation Team should hold final responsibility for synthesizing and reporting the data to the L-net Board.

Recommendation 18 – Budget [Board]

The prior recommendations for alleviating deficiencies and improving the L-net service require that more resources be directed to three main areas: support for collaboration, market research and marketing, and training coordination.

All teams require monies to increase communication via physical and virtual meetings and workshops. Partner libraries contribute value to L-net in various ways, including staff time. However, a new and complex program needs special consideration. [See next page.]



Collaboration opportunities [including staff time and overnight accommodation] - all teams \$15,000

Expending money for market research and marketing will have a major impact on reaching L-net audiences—Market research / Marketing

Team \$25,000

Increase of Training Coordinator position to full time \$16,000

Total increased costs for 2004-2005 year: \$56,000

For Year 3 of the project, utilizing a 7% increase in costs overall, except for marketing @15%, the budget would be:

Collaboration opportunities—all teams \$16,050

Market research and Marketing team \$28,750

Additional for Training Coordinator position to full time \$17,120

Total increased costs for 2005-2006 year: \$60,920



Part 1 Introduction

L-net is Oregon's statewide collaborative digital reference service. It is a LSTA funded-project initiated in 2003 as per the recommendation of the October, 2002, report from the Oregon statewide E-reference task force to establish a virtual reference service. In February, 2003, The Service Coordinator, Caleb Tucker-Raymond, summarized the status of the pilot project in the report, Answerland: Summary and Statistics, April-December, 2003. The name of the service was changed from Answerland to L-net in the spring of 2004.

D. L. Cohen Information Services was contracted by the L-net Fiscal Agent, Multnomah County Library, to complete an external evaluation as required by the LSTA grant. The board also wanted a third-party to recommend changes for improvement and enhancement to the service.

Good news

Transition is frustrating, confusing, heartening, exciting – and a leap of faith. The library community in Oregon has embarked on an adventure and as with most adventures in the early stages there is not yet a great deal of evidence about where one stands and where one is headed. We do know, though, that L-net is good for Oregon. Why?

- Library collaboration has moved ahead dramatically.
- Librarians are beginning to share knowledge on a regular basis, not just at conference time.
- The potential to advance resource sharing across the state has leapt ahead.
- L-net has laid a foundation for raising the visibility of libraries in Oregon.
- Not content to let technology continue to lure away patrons, libraries are pushing the boundaries of technology along *with* their patrons.
- New ways of delivering reference are coming and Oregon is embracing these changes.

But the *process* of transition is not easy. Determining what



moves to make and tactics to employ...it's new territory. New solutions must be begged, borrowed, stolen or created. This is not for the faint-of-heart.

Principles that can guide and make the way as easy as is possible are available. Is L-net guided by these? Unfortunately, the picture can be brighter here. There exists a:

- Lack of direction, vision, and goals to guide decision-making.
- Lack of a clear organizational and management structure for decision-making.
- Lack of systematic collection and analysis of information for decision-making.

This report will speak to these overarching problems and recommend changes to alleviate them. The report will also describe more targeted concerns raised in the focus groups and recommend specific tactics for dealing with them. In many respects, though, tending to the three areas outlined above will go far toward alleviating the day-to-day issues faced by a new statewide digital reference service.

Methodology

It was decided by the L-net Advisory Board to have the evaluator conduct focus groups. Three focus groups were arranged, two primarily for librarians who staff the L-net service, with a total of 17 participants, and one primarily for administrators of the partner libraries, with 8 participants, for a total of 25 participants [two valued members of Oregon's library community also participated]. Further details about these groups is contained in Appendixes C and D.

In addition to the focus groups, four strategic information gathering meetings occurred with consultant, the Program Coordinator and key members of the Advisory Board. Finally, pertinent documents, including all evaluative material available, were examined by consultant.

A note about quotations: Every effort has been made to provide exact quotations. However, it is sometimes difficult to tease out a complete quotation from a group discussion therefore there are some



quotes which have been smoothed over or lightly paraphrased for ease of reading. In no instance was the focus, tenor or intention of the speaker altered.

Limitations of this methodology: Focus groups are a qualitative approach to data gathering by providing an environment for structured discussion. Comments may or may not reflect a broader consensus, although given the small number of total librarians, administrators and advisory board members involved with L-net the selection of 25 individuals represents a significant, although not majority, inclusion of relevant opinions. Unfortunately, the one glaring omission is that school libraries had only one representative, primarily due to the groups being conducted in the summer.

[Note: “digital” and “virtual” will be used interchangeably.]



“we need a reason to be”

“no one has defined the parameters of success”

Part 2 Goals and Infrastructure

Mission / goals

Among the handful of concerns that just about everybody in the focus groups had is the lack of clear vision and goals for L-net; goals that can lead to actionable objectives. The circumstances of L-net’s birth set the stage for this confusion and the administrative and governing structure of the program has perpetuated a clouded mission.

On the other hand, much has been accomplished in the first year and it may be that it is only now, in hindsight, that the true outlines of what Oregon’s statewide virtual reference service can be will begin to emerge. We also know what we don’t know and can create strategies for filling those gaps. It is necessary, however, to have an infrastructure that encourages the maturing process and that is not available yet.

The question is: can the L-net partners define a successful program and, working within resource limitations, make necessary decisions about goals and operations. A tall order for which the recipe for success includes, briefly:

- Defining a successful program and target audience(s) [See section on Marketing] – there has been an almost total lack of market research. Currently, L-net is trying to be all things to all people. Is this realistic? Who should L-net be serving at this stage and what would success for them look like?
- Determining gaps – There has been no *systematic* effort to collect and synthesize crucial data [See section on Evaluation]. L-net must conduct on-going “formative” evaluations predicated upon the information that all stakeholders need.
- Making necessary decisions [See sections on L-net infrastructure and various recommendations in other sections of this report]–
 - The administrative and governing infrastructure [including relationships with partners and volun-



“...we’re in transition...need to zero in on purpose...”

teers] must be organized so that, simply put, more can get done. Due to budget limitations this will require a collaborative and creative effort. L-net *must come up with creative ways to get “buy-in” from volunteer partners and librarians to give more.*

There is “no goal statement” for L-net, no clear vision and no documented, quantifiable objectives. Market research has never been conducted to determine target audience(s). Oregon’s statewide virtual reference service was created as a result of recommendations from the OLA Vision 2010 report, as a result of “following a nationwide trend”, and to reduce redundancies that might result from virtual reference program development by certain entities in Oregon. There was also concern that the LINK program was serving fewer and fewer people and that providing a broad statewide reference service directly to the public would stem this trend.

“need to find out the real needs and shape the service to meet those needs”

need “more support centrally”

“establish our overarching goal...as a service what are we trying to accomplish: a statewide resource or real-time reference?”

“need to be more coordinated [rather than] this diffuse model”

“define the audience more”

“define what success would look like, what we are trying to achieve and a realistic picture of how do we support it and what role do we play in it”

“every administrator is supportive of the endeavor... [we need to have] some practical plan for getting there...then you go out to market and you have something to sell”

“what I want...from the grant employees is how this service meets my local library mission and the overall statewide goal...talk to me about that and then I can turn around and talk to my superiors or my funding agency about it”

“need values / mission statement”



Starred Recommendations are priorities.

Brackets indicate where primary authority rests.

***Recommendation 1 [Board]**

A clear mission for L-net should be established with specific measurable objectives.

For example, let's say L-net's mission statement includes improving access to library reference assistance by school-aged children in Oregon. Example Goal #1: L-net will market to schoolchildren. Example Measurable Objective #1: The L-net Service Coordinator and members of the Marketing Team will schedule speaking engagements with 15 teachers' groups during the '04-'05 school year. Example Measurable Objective #2: The Marketing Team will provide bookmarks to students in every middle school in Oregon.

Another example: perhaps L-net's Mission Statement includes proving the value of a collaborative virtual reference program among the current 20 participating libraries. Example Goal #1: Nurture more friendly relationships with partner libraries and their funders. Measurable Objective #1: The L-net Service Coordinator will visit one participating library each week to speak with administrators, librarians and a representative from the local funding source. Measurable object #2: L-net Service Coordinator or members of the Marketing Team will, under the guidance of the Marketing Team, conduct on-site demonstrations at L-net partner libraries for the public and members of the local library funding community.

Roles and Responsibilities

"Responsibility for centrally administering and coordinating the service should be clearly defined." [RUSA Guidelines]

Another major issue facing L-net is the amorphous nature of the infrastructure. This lack of clarity results in important decisions simply not being made, as each segment assumes another segment will 'take care of it'. Or, decisions are made but nobody has responsibility for implementation.

"a crucial part that is missing...mutual understanding of roles, responsibilities and authorities of the advisory board, fiscal agents and providers"



“the advisory board isn’t directing the project, osl isn’t directing the project, no one is really directing the project”

[the board’s] “participation is minimal”

“would like to see more direction from the top”

“...possibility is if the advisory board needs to be a governing board... have binding voting power...a board that makes decisions”

it’s a “slow decision-making process”

“there is a need for a centralized structure to pull it all together”

“the central leadership needs to decide what we want to do...we need to let the patrons know what the service is for...users are not expecting a statewide thing”

[want] “more support centrally”

“we need to zero in on the purpose”

[the structure] “is barely adequate...but a good start...[we had in the original mission statement that it would be a] “collaborative” reference service and “the structure reflects that...getting as many people involved on a different variety of levels as possible...we’ve diffused the structure”...[there are many people involved in the state and] “that is very successful...I would hate to abandon that”

“before throwing money at it...do a needs assessment...we had these assumptions about the need out there but we never had any data about it”

Teams

At times team have been set up and charged with certain tasks. They are/were:

- Reimbursement – tasks finished; inactive
- Licensed database team—tasks finished; inactive
- Software vendor team – tasks finished; inactive
- Naming team – tasks finished; inactive
- Privacy team – tasks finished; inactive
- Services team – finished immediate tasks, inactive; *“however, there is a lot of work that it could still be doing”*
- Marketing team – responsible for some discrete activities which were accomplished; inactive



- Assessment team – charged with transcript evaluation, user survey and follow-up survey; limited activities; active [?]

Partners: Service Agreements

“[there are] no written documents about the expectations of providers...[we] need a more formal agreement”

“Expectations for libraries participating in a collaborative service should be clearly defined before the local library commits to such a service.” [RUSA]

The RUSA guidelines outline some specific examples of partner commitments such as, “Each library should have a project liaison to represent the library in the group’s activities. Expectations for project liaison’s duties should be clearly stated.” [RUSA]

***Recommendation 2 [Board]**

Elements of the L-net infrastructure need to be charged with specific responsibilities and powers.

- The L-net advisory **board** should become a governing board / council.
- The role of the L-net **fiscal agent** should be more clearly defined.
- Include front-line librarians on the advisory board.
- **Establish the following teams.** Have members of the advisory board become members of the various teams and/or have librarians appropriate as teams leaders join the advisory board.
 - **Assessment / Evaluation** Oversee that all required data is collected, synthesized and produce quarterly data reports.
 - **Market Research / Marketing Team**
 - **Services Team**
 - **Training Team**
 - **Service Agreement Team** [temporary]
- The **Program Coordinator** should monitor and nurture the teams, facilitate opportunities for communication and collaboration among stakeholders, and actively participate in marketing efforts.



L-net will be asking more from its volunteer partners and it should have something to give back. Partners want to justify L-net to their funders. Statistics will help but funders must also be brought more “into-the-loop”. It is suggested that a marketing effort be aimed at them. This will be outlined in the section on Marketing and is alluded to in the second “example” of mission statement / goals / objectives above.

Communication

It would be helpful if opportunities for communication among stakeholders are increased. Helping everyone to keep up with news of other virtual reference programs and to share best practices will improve “buy-in” from players.

Recommendation 3 [Service Coordinator]

The Service Coordinator is encouraged to share information in a more systematic manner with all stakeholders about L-net developments and significant changes in the VRD community by way of the listserv, a blog and/or email newsletter. It is the responsibility of the Service Coordinator to nurture this communication.



“...think of your webpage as a branch”

Part 3 The Value of L-net

Focus group participants believe that a statewide virtual reference service is valuable and necessary. However, there are questions as to whether L-net’s approach is satisfactory and, for administrators, a concern that funders need yet to be convinced of its value.

The value of L-net can be measured in two ways: directly by the service it provides its users and indirectly by benefits to the overall Oregon library community.

Focus group participants pointed out that L-net brings the concept of library service to patrons, wherever they are. People for whom travel outside the home is difficult are served. Community members have the opportunity to expand their technical skills. There was some feeling that the increased exposure to library service will encourage more support for local libraries.

“10 years ago you didn’t think that banks would be in grocery stores... libraries have to re-invent themselves, we have to figure out how to bring libraries into the home, be available 24 hours a day”

“[it’s good to see] people understanding that you can use your library card to get access [without] coming in”

Administrators want to be able to bring solid data to their funders to show value in supporting the service. Funders will look for use of the service by their communities as well as level of patron satisfaction. Administrators are stymied by a lack of supporting data available. Needed are statistics on local use, as well as a *“long-term funding picture”*, and *“scenarios for good and bad times”* meaning what happens when local funding is pressed [well, more pressed than is usually the case for libraries].

User satisfaction surveys for the real-time component are completed by patrons only 25% of the time [and patrons are self-selected], and there is no opportunity for email patrons to express their opinions.

Geographic data, both zip code and a person’s local library, are collected for the real-time component. However, in locations hav-



ing an academic institution a zip code can represent either a local resident or a university student; the local library system will be uninterested in the latter. The email reference form asks for zip code, however, data has not been collated and analyzed.

Does a patron's perception of L-net as a local service vs. a statewide service matter?

For administrators there is some disagreement, although they generally lean towards the idea that it does not matter.

"[patron] just wants a high level of service...doesn't care...only wants quality service"

"if they get great service, they will support all libraries!"

"we're all involved in a program of public relations...[doesn't matter, helps libraries as a whole]"

"some patrons are connected strongly to their local library and don't want to 'go elsewhere'"

In short - good service leads to happy patrons, leads to library support in general. Funding, though, rests on actually serving local patrons; administrators want to take to their funders evidence that their communities are receiving the benefits of L-net.

"the funders don't necessarily have our philosophical approach" [said with a smile]

Recommendation 4 [Evaluation Team]

Provide data needed by administrators for funders.

L-net has fostered collaborative relationships.

"I'm excited by the infrastructure that wasn't here before...we didn't have access to the large public and academic libraries, now we have partnerships that didn't exist before"...[In remote communities] "we can say that we have access...it makes a board feel positive, knowing we're proactive"

"this framework will help us build better statewide services"

"partnerships are so important...this is still a small state...[there is] lots of potential for how we can work together."

"It's not going to happen top down. It's really gonna happen by us



making partnerships library to library”

Is L-net managed equitably?

Library funders also want to know that their share of support is reasonable. The general feeling among administrators is positive in regard to this issue. Some larger libraries and academic libraries provide more service but there is little expression of this as a problem. There is some anxiety about whether this comfortable situation will change as the fortunes (or not) of library systems fluctuate – what happens, for example, if the Multnomah County Income Tax is repealed? Anxiety also exists about how things will shake out if/when the service demand rises significantly.

A different type of equity issue – drywall questions

There was quite a bit of discussion of the roles of academic and public libraries. Potentially, a complicated and delicate issue to be resolved, many academic librarians feel that they should not be handling the many very general types of questions that public libraries handle so well – such as the question about how to install drywall that one academic librarian received. It is not clear to consultant whether the academic folks feel awkward answering these questions, or truly want to “save” their time for more in-depth questions.

“have triage – “front-line folks be first line of defense”

“it’s a waste to put an academic librarian on the front line”

“keep academic libraries for questions that need to be escalated”

“a triage system” [is needed]

Academic libraries are moving ahead with their own digital reference projects while participating in L-net. Due to concerns about the adequacy of public libraries answering questions from students in higher education, university students are being directed away from public libraries to academia for virtual reference while academic librarians continue to participate as responders to L-net questions—albeit desiring to respond to the in-depth and “specialty” questions such as inquiries related to law, medicine and government. [Subject specialties will be discussed further under Second Level Reference.]

Some of the public library folks expressed concern: will the in-



terest of academic librarians in L-net continue if their institutions are not receiving the benefits of resource sharing? Hearty support of L-net from the academic sector was forthcoming but this support should be monitored for changes.

Recommendation 5 [Services Team]

Explore appropriate roles for academic, public and school libraries and whether a tiered reference system is needed.

Does L-net demonstrate the value of libraries to the community?

Participants feel strongly that the concept of statewide virtual reference is valid and significant. Concern rests with the public perception, especially *“if the system keeps crashing”*.

Broadly, it's simply hard to know the impact at this point as not enough folks are using L-net and for those who are, statistics are limited.

Provider satisfaction with L-net

Focus group participants were asked to rate their overall satisfaction with L-net. On a scale of 1-5 with 5 being extremely satisfied, the average score of the librarians was 2.5. For administrators, it was 3 from their own perspective; when asked to imagine what their librarians would say, the number averaged 4. Clearly, there is a discrepancy between the perceptions of administrators and librarians which is why it is so important to have both perspectives represented throughout L-net's organizational structure.



Part 4 Operations and Services

Software

There are two software programs used by L-net, one for real-time chat – Virtual Reference Toolkit [VRT], and one for email reference questions – RefTracker. There is a “meeting room” component that functions similarly to the public chat interface but allows private collaboration and conferencing among L-net folks, however, this has not been used much.

The Software - Virtual Reference Toolkit

VRT is a memory intensive program capable of sophisticated operations, such as the ability to run a slideshow. L-net uses the real-time chat and co-browsing features. Focus group participants complained that loading and using the software was slow, the chat portion significantly slower than IM and the co-browsing feature slow and too often not working properly. [The latter happened during a session consultant had recently.] Some participants feel that the complexity of the software has inhibited potential librarians from participating in L-net.

“the software is clunky and slow”

“main problem is slow response times and discomfort with chat”

“no wonder people give up on us...it’s very slow, even just opening the screen [the load time]...I don’t always push pages because it is slow”

“the viability of chat reference is still a big question”

There was also much discussion about the training needed to be facile with the software and the fact that the limited hours one is staffing are insufficient to master the program. On the other hand, many people are unsatisfied with a two-hour staffing time as two hours is “boring” when traffic is low, too “overwhelming” when traffic is high. [Another reason for shortening shift times to one hour is that it wouldn’t “mess up schedules so much”.]

There seems to be a bit of a dilemma about the need for more online time vs not wanting to spend more than one hour per session on the service [although one participant so much loves staffing the chat portion that she willingly takes on hours from other librarians at



Unstructured discussions of librarians' experiences with VRT would probably reveal best practice tactics.

Sharing experiences with others involved in a new activity is psychologically re-assuring.

her institution]. In one case, a library condensed the number of librarians staffing L-net so that each would get enough session time to be comfortable and proficient with the software. [Ongoing training utilizing the software would also help resolve this issue.]

Some librarians are just not comfortable with chat, or at least with how chat is done in this venue. Some younger patrons get impatient with the slowness not only of the system but with librarians who don't know chat "shorthand" to speed the interaction. On the other hand, librarians who know this etiquette find it hard to quickly distinguish the preferences of the user. It is perceived by some that expectations of service by chat patrons are often unrealistic about what can be found and how quickly. An interesting point was made by a librarian that it is "*the nature of librarians to give more information than people need*" and that this could be the source for some friction between librarians and those who want quick responses.

It is noteworthy that the main concern about the software is with the real-time portion, not the email reference service. In fact, there is such a strong distinction that a couple of participants wondered if L-net should choose to focus on the email reference area only, until such time as issues of connectivity and ease of using the chat technology are improved.

"...it is hard to communicate the way we want to with chat"

[For a discussion of related training issues, see the section on Services]

VRT is statewide and refers patrons to any partner library unless a separate entry point has been set up by the library at which the user connects. It would be helpful for every library to have its own entry point.

Software – RefTracker

RefTracker is used directly by patrons and as a second-level reference resource by librarians.

Patron Use

RefTracker via the patron interface refers questions based on one criteria: what participating library has the fewest number of ques-



tions in the queue. Since it is based on call center software there is no consideration for content criteria. This approach counters any effort at triage for questions. It is hoped that an upgrade to this software, long delayed, will allow the creation of forms that will permit routing to libraries based on geography or subject focus.

When used as a re-allocation tool, RefTracker can direct questions to specific libraries. However, librarians often don't know which library to pick [see next section].

Second Level Reference

L-net was designed to succeed LINK as the second-level reference service in Oregon. The vast majority of focus group participants know this. Some libraries have their own second-level referral systems and it is a bit unclear to some librarians in those systems as to when to use which service.

Unlike LINK which is based on questions handled within a region [the significance of this being that the referring librarians have a better idea of who might be handling the referral] RefTracker's default will send a re-allocated question to whichever library has the shortest queue unless the librarian refines this process by specifying a receiving library and including a comment when re-allocating. At this time, however, most librarians have shallow knowledge of the strengths of most of the partner libraries. The major concern about statewide second level reference is the anonymity of the ultimate answer source [as well as knowing that the question was actually answered].

"...we would like to use L-net as long as we could be confident that it will go to a larger library with more resources, not to another small library"

"there is a trust issue" [of who will handle questions]

[wants to know that] "it doesn't get lost"

"want to know someone will be responsible"

[questions go] "out into the ether"

Subject specialists and specialty collections

There was a great deal of discussion about the need to know the people and collections that have specialized information.



“there are lots of subject specialists and it would be helpful to know who they are”

“we did originally say that we would come up with a list of specialty librarians and libraries”

“we have a law library person who could help”

“PSU is a government depository”

[participant envisions a] “subject list so people know where the expertise lies”

“would be good for the universities to know the specialties of public libraries”

The topic was refined as well:

[we need to] “define what we mean by subject specialist...have a set of criteria...determine what sort of questions are good to refer to a particular specialist”

***Recommendation 6 [Services Team]**

Among participating L-net libraries determine librarians and collections that can provide specialized knowledge.

“how do you select the specialty areas?...examine the questions?”

Some way of allocating RefTracker questions by subject would be greatly appreciated.

The effort to create a list of subject specialists and specialty collections would be far exceeded by improvement to the L-net service, to say nothing of the peace of mind of the L-net librarians.

Have libraries met the demand for second-level, library-to-library reference services? Not completely.

Other service issues that were raised:

- Instant Messaging as a back-up – there was some agreement that it would be useful to have a librarian available via IM to a librarian staffing the real-time service.
- Patron perception of local use – apart from the political aspects of patrons knowing they are/are not at the local library the librarians have mixed feelings about whether to be more “up front” when they are not the local librarian. Librarians may find it useful to discuss



this issue more.

- Database licensing – availability of databases varies. Ideally, librarians should all have access to the same databases.
- Some participants expressed frustration about working with groups one is not familiar with, for example, children.
- “Tiered” reference / triage / appropriate roles of public and academic libraries in L-net – Mentioned earlier but worthy of mentioning again, there were lively discussions about whether reference questions should be sent to public or academic libraries indiscriminately.

In the meantime, L-net staff and librarians can lay a foundation for more sophisticated routing of questions by combining transcript analysis with question analysis to create taxonomies of question topics and question types.

Recommendation 7 [Service Agreement Team]

Include requirement of utilizing individual entry points into the new Service Agreement.

“Triage is a particularly important step in the process of providing digital reference service.”, according to Pomerantz, Nicholson and Lankes. Using a Delphi strategy they have come up with a list of 15 meaningful considerations for triage. (Pomerantz et al, 2003)



Part 5 Marketing and Market Research

Market Research

“Marketing of the service should clearly define the target audience” [RUSA Guidelines]

Does L-net have a target market? Is everyone in Oregon the target market? Would prescribing smaller, more specific markets help L-net to focus efforts, hone the service and make a marketing program simpler? Data to help make these decisions is minimal.

Question analysis would help to determine topics, youth/adult age ratio, etc. Some virtual reference services track whether a person is a routine library user [defined variously] or someone who otherwise has had no prior connection to the library. This would be very useful information for a marketing program.

“lots of questions coming from kids”

“homeschoolers might be an untapped market”

“target a group”

It appears that the most common answers for how a user finds L-net is via their library’s homepage or via a suggestion from a librarian. However, if other marketing avenues, besides a link on a library webpage or encouragement from your local librarian, don’t exist then it can’t be determined if other approaches might be successful. Perhaps, more importantly, since virtual reference services are competing with other Web-based resources libraries that don’t reach out beyond their own current constituents may never see the growth in patron-base that is crucial to the survival of libraries.

***Recommendation 8 [Marketing Team]**

Initial target markets must be identified.

***Recommendation 9 [Services Team]**

Create a process for categorizing email and chat content to provide clues as to what the current user-base looks like. Include categorization of subjects of questions. This can also be the first step in describing the subject specialties for which experts and special collections need to be identified.



Recommendation 10 [Evaluation Team]

Consider adding criteria to the web forms which help identify the user base and their interests more clearly.

Marketing

Focus group participants are very concerned about the lack of marketing of the service. It came up again and again. The following remarks are a compilation of responses from various participants, especially in response to a question on identifying obstacles for L-net, and a request for Final Comments.

“not being marketed enough... word isn’t getting out...[should] market statewide to the public...[need a] marketing person...[need more] marketing...[do more than] just the link and press releases...if people see a demonstration that would help...marketing...marketing...lack of promotion...promotion...increase volume...why aren’t we publicizing? ...raise demand...bring up volume...gonna have to find a way to reach people successfully...got to see how it works to ‘get it’...[have] pop-ups on the webpage...must reach out to schools on how to use the program... convince boards... every library should have a link on its [home] page...not high enough profile...need an independent marketing consulting team...librarians are notoriously bad marketers”

The marketing approach L-net has taken is to market to libraries. While this may be useful, especially in attracting new library partners, it falls far short of what focus group participants want to see which is a direct marketing campaign to the public.

In the report, L-net Use by Clackamas County Residents, April 2003- May 2004, Oregon City outshines other areas. They took extra efforts to promote the service using bookmarks, etc. There is literature reporting that more robust marketing programs increase use of a digital reference service. [Wallace and Barber 2002, Hyman and Bromberg 2003, Coffman 2004]

“KnowItNow is the busiest public library virtual reference service per capita anywhere in the world...[it] has been consistently well managed and well marketed from the beginning and has paid special



attention to the needs of school children.” [Coffman, 2004]

Were L-net to embark on a major publicity campaign it would need plans for rising demand. A fear that came out in the groups was that, although there is reasonable balance/equity now in terms of partner contributions, if partner libraries do not join L-net in the same proportion as increased demand there will be a problem.

“will there be a demand for the service that we are not prepared to meet?”

“...want to know there will continue to be equity...what if we promote and no new partner libraries join...if we continue, what are we agreeing to in this regard?”

Administrators are interested in marketing to their funders and top administrators. This marketing would include:

“rewards and recognition...[something directors can use]...”to convince the board that we’re a library that is out there on the cutting edge...a trend setter...a proactive provider of library services...I know our director would want to see that”

“in the statewide promotion, the library would be recognized...if someone from the L-net board came to library board meetings and recognized the library for being a leader in the state...”

“...a write-up in the paper”

***Recommendation 11** [Marketing Team]

- Create a plan for marketing [include presentations and hands-on demos] to:
 - The Public
- Provider funders

A highly recommended suggestion from a focus group participant:

“don’t say we provide reference 24/7, say we answer questions about...” [medical, business, jobs, etc. information]

In other words, don’t use “librarianese”.

Name Change

“it’s important to mention in the focus group”

The name change from Answerland to L-net was not a ques-



tion and a conversation about it was thwarted in each of the focus groups or it would have taken a good-sized chunk of the allotted time, however, as stated above, mention must be made of the huge sense of dismay about the name, L-net, and the fact that the URL is no longer easy to remember.



“our transcripts are codified so we can learn from them”

Part 6 Shared Learning and Training

Shared Learning

The specific question of whether or not L-net fosters shared learning among librarians was asked of all focus group participants. Also asked: Should responses to questions that have been re-allocated be sent back to the referring librarians?

“there is more room for shared learning”

“some librarians don’t even know about chat...they are learning about technology”

“[have] partnerships with subject specialists and then bring the knowledge back”

“it’s very important for smaller libraries to learn from big places”

“training is a form of learning”

“training in evaluating transcripts is very useful in learning how to improve service”

RefTracker does not have a function to automatically send responses to referred questions back to the referring library. RefTracker can be searched to track down the history of a question; at times, some librarians will go back to review a question. Librarians have also employed other tactics to find out what happened to a question they referred or re-allocated. There seems to be a mix of reasons: learning from the response being the primary one; sometimes a librarian wants to know the question did not get “lost” in the process.

In general, there was a feeling that people are too busy to track down answers even though it is acknowledged that it would be a learning experience. This has implications for training. Structuring transcript review into training encourages librarians to do what they already want to do but don’t make time for.

“not a lot of shared learning, people don’t go back to look at answers”

“can RefTracker be set up to send answers back to both patron and librarians?”

“folks don’t know that RefTracker is searchable in different ways”

“but RefTracker only tracks questions that have been referred” [a mis-



perception]

“hard to get people to read answers that route back from referrals” [Note: questions are not routed directly back so this person apparently meant that the librarian does not go back and search Ref-Tracker for the question he/she referred or re-allocated.]

There is potential to create a publicly accessible knowledge base, a kind of an FAQ of commonly-asked questions. Although this feature is not being used at this time there seems to be some confusion about that fact.

“...haven’t learned how to use the knowledgebase yet”

“[there is a] problem having to open another window if one wants to use [the] knowledgebase”

“would like to see more use of the knowledgebase...there are predictable cycles of questions” – although several librarians thought that most questions do not overlap much.

A problem with updating the knowledge base is that all identifying, or potentially identifying, information must be stripped from the transcript. Until such time as there is a consensus desiring its development an effort to incorporate the knowledgebase into the service is not warranted.

Training

Training has been identified by focus group participants as an area needing improvement and expansion and an additional staff person is being hired for a nine-month contract. At the time the focus groups were conducted, though, participants did not know about this hiring. Had they known, responses may have been different.

Training has been provided to librarians via onsite workshops and early on selected librarians, called Guerrillas, were key in training.

Training was mentioned by the focus group participants in relationship to both technical skills and digital reference skills.

“...need a good infrastructure for training”

[need] “full-fledged training”

“every person at [library] gets a copy of every session...that’s really helpful, mini-ongoing training”



The need for more opportunities for sharing information -

“Why we’re mute is we don’t have a lot to work from because we’re in our little places.”

- an explanation for why the group didn’t have additional ideas for changes to L-net

“reviewing transcripts helps one become sensitized to dealing with non-local [folks]”

“librarians don’t get enough practice”

Focus group participants were not asked specifically the types of training they want. However, there were some comments to this effect and a number of inferences that can be drawn from responses to other questions.

[need] “more opportunities for people to come together...whenever I’ve been in a group it was helpful”

“have training that fits what a library can offer...not advanced training for most public libraries”

“...maybe training for librarians working with kids?”

[wants] “...more training opportunities”

“review transcripts”

“working with groups you’re not used to is a challenge”

“evaluate transcripts after names are omitted”

“simplest training is to get answers back”

“we haven’t used the potential of the meeting room software...[this is a] powerful tool that could be more fully used...WE HAVEN’T TRAINED ON IT” [caps added]

Consultant is left with the impression that people know what they need to learn, are hopeful of more training opportunities on an *ongoing* basis and they also feel that collaboration is a very helpful component of learning. Indeed, as a *collaborative* reference service what is striking to consultant is that the prime service delivery tool – collaborative software – is not being fully used for training. Not only would it provide opportunities for more training it would in itself be training — on the real-time software.

The Washington State Virtual Reference Service training has been mentioned as a good example of training done right and that model is based on almost total use of online tools. L-net software has the ability to convene small groups of people in a virtual learning environment. Given the statewide nature of L-net this presents an opportunity to coordinate and provide training interactively and frequently to



all L-net librarians.

In consultant's opinion L-net does not need a full-time trainer; it needs a coordinator of training whose primary responsibility is to facilitate and encourage the on-going collaborative training relationships and opportunities developed by the Training Team.

Recommendation 12 [Training Team]

Fully utilize the software features in providing training.

***Recommendation 13** [Training Team]

Utilize the new training staff person to coordinate and direct training arrangements, and to facilitate collaborative online [and some physical] training meetings, not, primarily, as the person who trains others.

Recommendation 14 [Training Team]

Provide training opportunities that are frequent utilizing the concept, as one librarian put it, of "mini-ongoing trainings".

Recommendation 15 [Training Team]

Establish ongoing transcript analysis as per Recommendation #9 as well as for digital reference quality

Training Survey

The Technology

A training survey was distributed to librarians to which approximately one-third responded. The majority strongly requested more training for VRT and some requested more training on RefTracker. More than half of respondents indicated that VRT and RefTracker training should be ongoing.

Digital Reference Service

A majority of respondents desire training on how to conduct reference virtually. Many also feel that some type of specialized training for working with youth would be useful.



Some other comments from the survey report:

“Some training needs might be addressed by having more ongoing conversation with participating librarians.”

“Most survey respondents did not seem willing to travel very far.”



“Evaluation and Improvement...”

A virtual reference service should be analyzed regularly, using input from staff and patrons, to evaluate its effectiveness and efficiency...

Evaluation may encompass many methods such as the analysis of statistics, patron feedback, and reviewing transcripts.”
[RUSA Guidelines]

Part 7 Evaluation and Assessment

“would be interesting [to see stats] on what type of questions kids ask”

Real-Time Component - Virtual Reference Toolkit

The real-time component of L-net has generated data on overall usage, usage by time of day, day of week, month, zip code and “Level” [choices supplied by L-net: General Interest, Elementary/Middle, High School, College/Research, Professional]. There is some state comparison data, although without more information about those programs it’s rather tricky to know what to make of this data. In regard to the zip code data, as mentioned earlier, for those zip code areas containing both public and academic institutions geographic analysis is complex if not impossible.

User satisfaction survey results for the real-time component show a positive trend. With a total of about 2100 questions, almost 500 individuals completed the online user satisfaction survey. Of these, 81% expressed satisfaction at the answer they received [Yes/No response]. 91% expressed average or better in overall satisfaction with the service. 87% would use Answerland again. Note that there is self-selection as to who completes the survey.

A transcript analysis was completed on 143 transcripts yielding an overall average score of 62%, which represented the degree to which relevant service guidelines were met.

Email Reference - RefTracker

RefTracker only has automatic functions for creating reports on Level of Response [General, Elementary/Middle, etc.] and which library answered the question. The former is a questionable measurement for evaluative data. The latter data has not been published. The option for reporting other data is to manually code each of [or a sampling of] the email questions. It is hoped that the new version of RefTracker will include options to allow easier collection of data.

There are several Web interfaces for email reference, some allowing data to be entered into RefTracker automatically and some



requiring manual entry. The bottom line is that the email reference system is very complex.

Training Survey

[Please see section on Training in this report for background.]

Approximately sixty librarians staff L-net yet only one-third of them responded to the survey. It is consultant's understanding that this was considered acceptable since each library had a representative speaking for it. Given the importance of this feedback, the small

Recommendation 16 [Service Agreement Team]

Require participation of partners in L-net evaluation efforts written into the Service Agreement.

number of librarians involved with L-net and the commitment each librarian makes to the service it is reasonable to insist that each librarian respond to such a survey.

Evaluation is a tool that provides insights for service, justification for funding, and direction for marketing. Evaluation is not a "second-class" activity and needs real commitment to work. *What* is to be evaluated and *how* are questions requiring dedicated focus.

Benchmarking

Prior to instituting L-net there was an effort to gather information from other virtual reference programs. Since that time there has been no "official or systematic" effort to compare / benchmark L-net's progress apart from the transcript analysis mentioned above although there is an informal effort to gather useful research and selected L-net stakeholders attended the national virtual reference conference in 2003. As a result of the conference the initiative to provide separate entry points to L-net was put into place. Apart from that, significantly, there was "not a lot of sharing about what we learned".

"do we know what other states are doing?"

"let's see what other states are doing"

"outreach to other statewide programs would be great...a good job for the project coordinator"

"there are other states with more libraries participating...how did they get them involved"



Recommendation 17 [Evaluation Team]

Data collection can be shared between Evaluation Team members and appropriate other L-net teams. For example, the Services Team for transcript analysis and question content, the Training Team for training surveys, and the Marketing Team and L-net Program Coordinator for demographic and user satisfaction data. The Evaluation Team should hold final responsibility for synthesizing and reporting the data to the L-net Board on a quarterly basis.

For evaluation assistance the LSTA recommended website from the University of Wisconsin Cooperative Extension Program Development and Evaluation is helpful. [See Bibliography.]



Part 8 Closing and Budget

This study was charged with examining L-net in regard to the following goals.

1. Meeting the objectives of the 2002 Statewide E-Reference Task Force Proposal Report, “Establishing E-Reference Services for Oregon: Proposal and Recommendations”.
2. How well the service has met the demand for digital reference
3. How well the service has met the demand for second-level reference
4. How well the service has met the needs of participating libraries

Objectives

For the purpose of this study these goals were further refined by consultant, L-net Program Coordinator and selected members of the Advisory Board into the following keys areas of data collection:

- Significance of patrons perceiving the service as coming from their local library [from a policy standpoint]
- Significance of patrons perceiving the service as coming from their local library [from a front-line perspective]
- Equity in resource sharing [asked of administrators only]
- Return on Investment, the value of the service [asked of administrators only]
- L-net’s contribution to demonstrating the value of libraries as the place to go for answers
- Changes to address as L-net moves forward
- Perceived level of satisfaction among L-net administrators and librarians
- Whether L-net fosters shared learning among librarians
- Whether L-net is satisfying the need for second-level reference service in Oregon [asked of librarians only]
- Needs of partner libraries

Demand for digital reference

This question can simply not be answered at this time. Without market research, benchmarks and more extensive statistical data we



cannot judge the demand, or what the demand can be. Surely, the surface level of “demand” L-net experiences at this point is more than met, so to speak. This low level of “demand”, though, is unacceptable to all focus group participants.

The appropriate question is: can L-net discover a potential, and/or create a demand, for digital reference in Oregon?

Demand for Second-level reference

As familiarity and knowledge [for example, by reliable lists of subject experts and specialty collections] changes the sense of apprehension about sending patron questions “out-into-the-ether” to a sense of trust in the process, demand will grow. Fine tuning this system is all that is required.

Needs of partner libraries

Unfortunately, they have not nearly been met to the degree necessary. Let’s split this area in two:

- Partner librarians’ needs

There is a lot of room for increasing satisfaction among the librarians, some solutions that can be implemented now; some that will only be improved with software upgrades. Areas of support include ongoing training opportunities, opportunities for sharing experiences and ideas about issues raised in this report, and the power, through teams, to actually implement changes.

- Partner administrators’ needs

A “fair” mark here. Provide them the statistics they need and the recognition they need and deserve. Demonstrate to local communities how wonderful their libraries are by rewarding and recognizing in the public sphere the libraries’ contributions to a cutting edge, forward thinking, technologically up-to-date public service. Win the support of local communities and L-net wins.

Finally, everyone’s needs will be better served once issues of governance, structure, goals and data collection are more effectively addressed.



Recommendation 18 – Budget [Board]

The prior recommendations for alleviating deficiencies and improving the L-net service require that more resources be directed to three main areas: support for collaboration, market research and marketing, and training coordination.

All teams require monies to increase communication via physical and virtual meetings and workshops. Partner libraries contribute value to L-net in various ways, including staff time. However, a new and complex program needs special consideration.

Collaboration opportunities [including staff time and overnight accommodation] - all teams

\$15,000

Expending money for market research and marketing will have a major impact on

reaching L-net audiences—Market research / Marketing Team

\$25,000

Increase of Training Coordinator position to full time

\$16,000

Total increased costs for 2004-2005 year:

\$56,000

For Year 3 of the project, utilizing a 7% increase in costs overall, except for marketing @15%, the budget would be:

Collaboration opportunities—all teams

\$16,050

Market research and Marketing team

\$28,750

Additional for Training Coordinator position full time

\$17,120

Total increased costs for 2005-2006 year:

\$60,920



Appendix A List of Recommendations

***Recommendation 1** [Board]

A clear mission for L-net should be established with specific measurable objectives.

Recommendation 2 [Board]

Elements of the L-net infrastructure need to be charged with specific responsibilities and powers.

- The L-net advisory **board** should become a governing board / council.
- The role of the L-net **fiscal agent** should be more clearly defined.
- Include front-line librarians on the advisory board.
- **Establish the following teams.** Have members of the advisory board become members of the various teams and/or have librarians appropriate as teams leaders join the advisory board.
 - **Assessment / Evaluation** Oversee that all required data is collected, synthesized and produce quarterly data reports.
 - **Market Research / Marketing Team**
 - **Services Team**
 - **Training Team**
 - **Service Agreement Team** [temporary]
- The **Service Coordinator** should monitor and nurture the teams, facilitate opportunities for communication and collaboration among stakeholders, and actively participate in marketing efforts.

Recommendation 3 [Program Coordinator]

The Service Coordinator is encouraged to share information in a more systematic manner with all stakeholders about L-net developments and significant changes in the VRD community by way of the listserv, a blog and/or email newsletter. It is the responsibility of the Service Coordinator to nurture this communication.

Recommendation 4 [Evaluation Team]

Provide data needed by administrators for funders

Recommendation 5 [Services Team]



Explore appropriate roles for academic, public and school libraries and whether a tiered reference system is needed.

***Recommendation 6** [Services Team]

Among participating L-net libraries determine librarians and collections that can provide specialized knowledge.

Recommendation 7 [Service Agreement Team]

Include requirement of utilizing individual entry points into the new Service Agreement.

***Recommendation 8** [Marketing Team]

Initial target markets must be identified.

***Recommendation 9** [Services Team]

Create a process for categorizing email and chat content to provide clues as to what the current user-base looks like. Include categorization of subjects of questions. This can also be the first step in describing the subject specialties for which experts and special collections need to be identified.

Recommendation 10 [Evaluation Team]

Consider adding criteria to the web forms which help identify the user base and their interests more clearly.

***Recommendation 11** [Marketing Team]

Create a plan for marketing [include presentations and hands-on demos] to:

- The public
- Provider funders

Recommendation 12 [Training Team]

Fully utilize the software features in providing training.

***Recommendation 13** [Training Team]

Utilize the new training staff person to coordinate and direct training arrangements, and to facilitate collaborative online [and some physical] training meetings, not, primarily, as the person who “trains” others.

Recommendation 14 [Training Team]

Provide training opportunities that are frequent utilizing the concept, as one librarian put it, of “mini-ongoing trainings”.

Recommendation 15 [Training Team]



Establish ongoing transcript analysis as per Recommendation #9 as well as for digital reference quality

Recommendation 16 [Service Agreement Team]

Require participation of partners in L-net evaluation efforts written into the Service Agreement.

Recommendation 17 [Evaluation Team]

Data collection can be shared between Evaluation Team members and appropriate other L-net teams. For example, the Services Team for user satisfaction data and transcript analysis, the Training Team for training surveys, and the L-net Program Coordinator for demographic data. The Evaluation Team should hold final responsibility for synthesizing and reporting the data to the L-net Board.

Recommendation 18 – Budget [Board] [See next page.]



Recommendation 18 – Budget [Board]

The prior recommendations for alleviating deficiencies and improving the L-net service require that more resources be directed to three main areas: support for collaboration, market research and marketing, and training coordination.

All teams require monies to increase communication via physical and virtual meetings and workshops. Partner libraries contribute value to L-net in various ways, including staff time. However, a new and complex program needs special consideration.

Collaboration opportunities [including staff time and overnight accommodation] - all teams \$15,000

Expending money for market research and marketing will have a major impact on reaching L-net audiences – Market research / Marketing Team \$25,000

Increase of Training Coordinator position to full time \$16,000

Total increased costs for 2004-2005 year: \$56,000

For Year 3 of the project, utilizing a 7% increase in costs overall, except for marketing @15%, the budget would be:

Collaboration opportunities—all teams \$16,050

Market research and Marketing team \$28,750

Additional for Training Coordinator position to full time \$17,120

Total increased costs for 2005-2006 year: \$60,920



Appendix B Consultant Advisory Team

Caleb Tucker-Raymond
L-net Service Coordinator
Multnomah County Library

Barbara O'Neill
Reference Program Manager
Washington County Cooperative Library Services

Sharon Klemm
Reference Coordinator / Fiscal Agent Liaison
Multnomah County Library

Anne Gruel
Reference Librarian
Jackson County Library Services



Appendix C

Focus Groups: Participants, Locations, Dates

Fri. July 9, 2004 Multnomah County Library, Portland

Loree Hyde	Oregon Institute of Technology	Operations Librarian
Arden Shelton	Multnomah County Library	Reference Librarian
Mary Bush	Tigard Public Library	Reference Librarian
Dolores Judkins	Oregon Health Sciences Univ. Lib.	Director
Daniel Peterson	Woodburn Public Library	Assistant Director
Diana Gleason	Eastern Oregon University	Reference Librarian
Kim Wilson-St.Clair	Portland State University	Reference Librarian
Emily Papagni	West Linn Public Library	Reference Librarian

Mon. July 12, 2004 Oregon State Library, Salem

Don Frank	Portland State University	Asst Univ. librarian
Kevin Barclay	Deschutes	Adult Services Manager
Linda Lybecker	Hillsboro	Head of Reference
Rob Everett	Eugene Public Library	Head of Adult Services
Vicky Oglesby	Multnomah County Library	Manager, Holgate Branch
Julia Corkett	West Linn Public Library	Director
Carolyn Rawles Heiser	Corvallis Public Library	Director
Linda Malone	West Linn Public Library	Head of Reference

Tues July 13, 2004 Eugene Public Library, Eugene

Deborah Kaufman	Eugene Public Library	Head of Reference
Lorie Vik	Eugene Public Library	Reference Librarian
Carrie Ottow	Corvallis Public Library	Reference Librarian
Janice Weide	Salem Public Library	Head of Reference
Julie Connoley	Deschutes Public Library System	Reference Librarian
Jane Nichols	Oregon State University	Reference Librarian
Nicki Maxwell	Churchill High School	Media Specialist
Lori Moore	Jackson County Library	Reference Librarian
Deb Carver	University of Oregon	University Librarian



Appendix D

Focus Groups: Areas of Discussion

For administrators:

Significance of patrons perceiving the service as coming from their local library

Equity in resource sharing

ROI - Return on Investment, the value of the service

L-net's contribution to demonstrating the value of libraries as the place to go for answers

Changes to address as L-net moves forward

Perceived level of satisfaction among L-net administrators and librarians

Whether L-net fosters shared learning among librarians

For librarians:

Whether L-net fosters shared learning among librarians

Whether L-net is satisfying the need for second-level reference service in Oregon

L-net's contribution to demonstrating the value of libraries as the place to go for answers

Obstacles to L-net achieving its goals

Changes to address as L-net moves forward

Perceived level of satisfaction among L-net librarians

Significance of patrons perceiving the service as coming from their local library



Appendix E

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