

Michigan Virtual Reference Service Collaborative

**”Research Help Now”
Fall Program Update
Wednesday, September 19, 2007
at
Michigan Library Consortium**

Minutes

Present: Maggie Bacon, Carol Briggs-Erickson, Hui Hua Chua, Diane Donham, Kassie Dunham, Kim Farley, James Flaherty, Beth Garnsey, Debby Harris, Mary Kickham-Samy, Angela Kille, Janet Krawulski, Ronghua Luo, Sandy McCarthy, Allison McFadden-Keesling, Janice Murphy, Roy Nuffer, Janine Odlevak, Maureen Perault, Teresa Prince, Jim Ratliff, Suzanne Sawyer, Heidi Schroeder, Eileen Shaw, Marty Stilwell, Mike Ugorowski, Marion Van Loo, Ann Walaskay, Arlene Weismantel, Cindy Yonovich

Collaborative Update and Decisions

Sandy McCarthy welcomed everyone to the 3rd Annual Michigan Virtual Reference Service Collaborative Meeting.

After brief introductions, Sandy provided everyone with a Question Point “pop quiz” to determine the level of competence with QP.

1. Best Transcript Review Award – Debby Harris

Quality Assurance Manager Debby Harris presented awards for the three best virtual reference transcripts of last year. Over 50 transcripts were nominated by Managers, stripped of identifying information, and judged by Kassie Dunham (Kellogg CC), Debby Harris (Lansing CC), Mary Kickham-Samy (Macomb CC), Angela Kille (MSU), Janine Odlevak (St. Clair County CC), and Arlene Weismantel (MSU). The transcript winners were Dana Keyes (Muskegon CC), Janine Odlevak, and Christine Tobias (MSU). Each winner received a gift certificate from the collaborative. Gift certificates were donated by Kellogg CC Library, Lansing CC Library and the MSU Libraries.

2. Needs Assessment Survey Monkey – Arlene Weismantel

Arlene provided a summary of the Needs Assessment Survey Monkey emailed to all Michigan four year public and private universities, all Michigan community colleges not currently in the Collaborative, and to over 200 public libraries from the various six divisions. The survey was to determine the level of interest among Michigan libraries to offer virtual reference and how many libraries are currently offering some form of virtual

reference service. Only 28 libraries responded to the survey. Six libraries indicated that they are interested in receiving more information about the Collaborative.

The complete Survey Results can be viewed on the Research Help Now Intranet.

3. Proposed Minimum Level of Service per Library – Sandy McCarthy

Sandy provided the Group with proposed minimum level of service per library spreadsheet. After some discussion, everyone agreed to provide a minimum of three hours of staffing for virtual reference per library.

4. Schedule – Sandy McCarthy

Sue Miles, Northwestern Michigan College, has agreed to return as our Master Scheduler. Yeah!!!!

The following decisions have been made in regards to the Schedule for Fall/Winter:

- It was decided that the Collaborative will no longer use the Yahoo Calendar for the schedule. Sue will create the schedule and it will be posted to the Collaborative listserv virtual-ref@mcca.org and posted on the RHN Intranet
- Respond to Sue's scheduling emails immediately to avoid follow-up emails.
- The schedule will list the name of the academic library not the specific librarian scheduled for the VR shift.

Shift Trades and Replacements – from Policy Manual p. 12 Revision

1. If trades in shifts need to be made, the manager will first try to do it within his/her own institution. If that isn't possible, the manager or librarian will post an email to the Collaborative Listserv requesting coverage from another library noting the needed dates (s) and time (s).
2. Librarians from other institutions who wish to take on the posted shift (s) should reply to the librarian only and cc Sue Miles. This will avoid numerous emails on the listserv.
3. Once a replacement has been found, the librarian will post a message to the listserv that a replacement has been found.

On Call List

Several librarians expressed an interest in creating an "On Call List" of librarians for emergencies. Sue will post a message detailing the "On Call List" to the Listserv once the schedule has been completed.

Summer Schedule

The summer schedule has become a challenge. With five academic libraries providing zero hours of coverage for the Collaborative this past summer, some changes are needed. Many community college librarians work less than a 12 month contract and most of their time off is during the May-August time frame. If your library is not able to participate in

the summer schedule, please volunteer now for special responsibilities. Special responsibilities can include being responsible for planning the annual meeting, updating the Collaborative Policy Manual, participating on a subcommittee such as Marketing....

A good example of this is Lansing Community College. They are not able to participate in the summer schedule, but they manage the Quality Assurance/Best Practices responsibilities for the Collaborative.

Sue Miles will be sending out an email about the fall schedule by the end of the week. Please respond promptly.

Just a reminder that when the librarian logs in to the queue, the service is open for business. Make sure to login on time. With Question Point, we control the hours of operation for the Collaborative. The Library of Michigan can monitor its own queue and offer different hours of operation.

5. Reports – Sandy McCarthy

In today's folder are printouts from two documentation handouts on Online reports and Offline reports. They can also be found online at

<http://www.questionpoint.org/support/documentation/gettingstarted/index.html>

There are three levels of reports:

Librarian -- Librarians can run reports about themselves

Institution – managers can run reports for their library about their patron requests and librarians

BME (top level administration) – Ann's ID can run reports comparing all libraries in the Academic Group. Diane Donham/Janice Murphy can run administrative reports for the Library of Michigan queue.

Further training is needed for the BME reports. Sandy will contact Tom Miller for more information. Our goal is to run monthly reports for the Collaborative reporting on how many questions were asked, answered, followed up for each library. Ann and Sandy will get back with everyone on preferences for monthly reports.

6. Technical Problems on Campus – Sandy McCarthy

What to do if you lose Internet connection on campus during VR or experience a power outage? The following language was approved for the Policy Manual.

What to do if your campus has lost Internet connection or power before or during your scheduled VR shift.

1. Call the other library currently scheduled to monitor VR with you during your shift. Explain your situation.

2. If you are the only librarian scheduled to monitor VR call Sue Miles. Sue will send out an email to the listserv asking for an immediate replacement. This is also a time when an “On Call List” can be very useful.

Make sure that all librarians have a copy of the schedule and master list of VR librarians available at all times to immediately report any Internet or technical problems to another librarian.

7. VR Policy Manual – Sandy McCarthy

The “Research Help Now” Michigan Virtual Reference Service Collaborative is out of date. The current Policy Manual makes references to Tutor.com software. The Policy will be revised by Ann and Sandy, and proofread by Jim Ratliff and Mike Ugorowski. Expected date of completion is November 2007.

8. Listservs -- Sandy McCarthy

We will no longer use the Yahoo VR-Provider Listserv and the Yahoo Managers Listserv. Everyone is to create their own manager contact list in email.

The Collaborative Listserv is hosted by Michigan Community College Association (MCCA). It is becoming a challenge to keep up to date, due to the scattered requests for updates. Sandy does not personally update the listserv, she only passes on the information to Mike Wahl.

Does any library have the capability of hosting a listserv for the Collaborative? MSU will look into hosting the listserv. MLC might also be an alternative.

9. RHN Website and Intranet -- Sandy McCarthy

Sandy reviewed the redesign of the “Research Help Now” website homepage for October 1, 2007 launch date for Question Point. Technical information has been updated for patrons to consult should they encounter any problems.

RHN Intranet consists of a list of documents for librarians to consult. Links to Question Point documentation, most current list of librarians and managers, marketing information, several logo image files, Policy Manual, Newsletters, Schedule, Training: Quality Assurance, and Virtual Reference reading list are on the Intranet.

10. Library of Michigan – Ask Us -- Sandy McCarthy

The Library of Michigan will retain their separate queue named Library of Michigan. The Library of Michigan queue is an option for librarians to select under create a librarian account. Of course, the Academic Group librarians will only select the Academic Group, and the Library of Michigan librarians will only select the Library of Michigan Group.

Check out Ask Us at
http://www.michigan.gov/hal/0,1607,7-160-17449_18640_18659---,00.html

11. Question Point Training –

A. QuestionPoint queues, policy pages, scripts, and workflow/resolution codes - Angela Kille

Angela Kille's presentation focused on QuestionPoint queues, policy pages, scripts, and workflow/resolution codes. She first demonstrated how to select the Michigan Academic Group queue and noted that you can't transfer between librarians from different institutions when using the practice queue.

Next, she talked about policy pages, including where to find them when in a chat session and mentioned that this is where we would find the database login information for each institution. Each institution maintains its own policy page now, so a policy contact is listed on each page. If a change needs to be made to a policy, contact that person. To edit your policy pages, administrators can go to the Profile module and then click on Policies. You can use HTML tags when adding content to the Policy page.

Angela discussed the three different levels of scripts: personal, institution, and shared. Scripts can be added, edited or removed at any time by going to the Ask module, then Settings. You don't have to be in an active chat session to make changes.

Finally, Angela talked about Resolution Codes and how that affects workflow. A resolution code needs to be assigned at the end of each chat session. The "Followup By Me" code will move the transcript to New status for you and your library and will require action by you to finish answering the patron's question. The "Followup Up By Patron's Library" code will move the transcript to New status for the patron's library and will require action by someone at the patron's library. A discussion took place about the Lost Call resolution code and when to use it.

Lost Calls – clarification after our discussion

From Question Point Best Practices. Use the descriptor "Lost Call:" If the patron never responds, and does not have an email address. Do not use Lost Call if the patron left an email address; instead, use Follow up by patron library

B. Discussion of Description Codes – Mary Kickham-Samy

In a discussion facilitated by Mary Kickham-Samy, Macomb attendees discussed the descriptive codes. Mary reminded everyone that the descriptive codes were the terms that virtual reference librarians assigned to a session after the patron had signed off and before the librarian closed the session. These terms are useful for statistical purposes. Each session may be assigned as many as four codes, which may be changed later. Then, the discussants analyzed the list of descriptive codes and decided that some were redundant,

ambiguous, or irrelevant. Mary said that this discussion could be continued on the blog
Below is the result of the group analysis.

Codes to be ignored because they are irrelevant or redundant: Access, Duplicate
Question; Local – catalog; Local - non-catalog; Other; Reference; Spam. Tools.

Codes used primarily by the Library of Michigan: Law, Medical

Codes, the meanings of which are self-evident and do not need a definition:
Circulation, Genealogy, Inappropriate, Interlibrary Loan (ILL)

Codes that needed further clarification:

Catalog: Instruction in using the catalog

Directional: physical/spatial

Electronic Resources: access to databases and catalog

Holdings: generic; not a request for a specific item. Example: What do you have on X
subject?

Homework: requests by school children

Instructional: Answers that involve teaching as opposed to ready; many, if not most,
questions involve teaching.

Item Request: hold specific item; no instruction is involved.

No question: patron wants company; lonely

Non-affiliated: outsider

Ready reference: Quick one-source answers

Referred to home library: Call your home library

Research: Research Paper

Technical Problem: problems with the QP software; problems with database
authentication.

Test: practice session

12. Wrap Up – Sandy McCarthy

Our Collaborative will open with Question Point software on Monday, October 1, 2007.

Please continue to test the software and report your problems to Tom Miller

millertj@oclc.org and cc your email to Evette Atkins atkine@mlcnet.org

In summary, an update master of list of VR librarians will be sent out to the listserv, Sue
will be emailing the managers about fall schedule, follow-up about Reports will be sent
out once Ann and Sandy receive more training, and Mary Kickham-Samy will email
everyone a copy of the decisions made during the discussion about description codes.