## RATIONALE

<table>
<thead>
<tr>
<th>WHAT IS IT?</th>
<th>WHY TO OFFER IT?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Virtual reference</strong> is reference service initiated electronically where patrons employ computers or other technology to communicate with public services staff without being physically present.</td>
<td>According to the ALA’s Standards for Distance Learning Library Services, “every student, faculty member, administrator, staff member, or any other member of an institution of higher education, is entitled to the library services and resources of that institution, including direct communication with the appropriate library personnel, regardless of where enrolled or where located in affiliation with the institution,” the Access Entitlement Principle. “Academic libraries must, therefore, meet the information and research needs of all these constituents, wherever they may be.”</td>
</tr>
<tr>
<td>Communication channels used frequently in virtual reference include chat, videoconferencing, Voice over IP, co-browsing, e-mail, and instant messaging. (RUSA, 2010).</td>
<td>Mt. SAC Distance Learning AP 4105 states “to ensure support for DL students comparable to traditional students, services should be available in an online mode. Services include, but are not limited to, counseling, library resources and library reference services, tutoring, textbook purchase or rental, fee payment, and placement processes.”</td>
</tr>
<tr>
<td></td>
<td>ACCJC Accreditation Standards (First reading January 2014) states: “The institution supports student learning and achievement by providing library, ... responsible for student learning and support that are sufficient in quantity, currency, depth, and variety to support educational programs, regardless of location or means of delivery, including distance education ...”</td>
</tr>
<tr>
<td></td>
<td>Students who have challenges visiting the library could get basic assistance online. If we join the consortium, students can get help at their point of need even when the library is closed.</td>
</tr>
<tr>
<td></td>
<td>Transcripts of online reference transactions can help identify areas for improvement in references services and potentially collection development.</td>
</tr>
</tbody>
</table>
Research has shown that students consider online chat reference service as a significant service option. (Granfield and Roberston, 2008, p. 51).

**BUDGET**

<table>
<thead>
<tr>
<th>WHY QuestionPoint?</th>
<th>HOW MUCH DOES QuestionPoint COST?</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC QuestionPoint is a reference management system that integrates chat and email. Essential features:</td>
<td>OCLC QuestionPoint Subscription Annual Cost through CCLC:</td>
</tr>
<tr>
<td>1. 24/7 coverage through cooperative</td>
<td></td>
</tr>
<tr>
<td>2. Referral system for cooperative members</td>
<td>$4,750 + $2,375 if no coop contribution</td>
</tr>
<tr>
<td>3. Message queues &amp; message transfers</td>
<td>$4,750 + $2,375 + $500 for Mt. SAC only queue</td>
</tr>
<tr>
<td>4. Multiple users</td>
<td>Staff + equipment costs: will be funded by the Dean</td>
</tr>
<tr>
<td>5. Built-in transcripts</td>
<td></td>
</tr>
<tr>
<td>6. Auto usage statistics</td>
<td></td>
</tr>
<tr>
<td>7. Chat, pushing pages, and co-browsing</td>
<td></td>
</tr>
<tr>
<td>8. Knowledge base of questions/answers</td>
<td></td>
</tr>
<tr>
<td>9. Integrated follow-up system</td>
<td></td>
</tr>
</tbody>
</table>

Additional factors:
- QuestionPoint is a robust reliable system that has a long history of service and development.
- It allows “seamless integration of chat, follow up and referral, as well as one-stop reporting tools” (CCLC on QuestionPoint)
- [California Community College QP Group](http://example.com) provides additional support.

NOTE (RUSA, 2010):
4.3.1 The library budget should include specific allocation of funds to cover the personnel, hardware, software, connectivity, furnishings, training, publicity, and space to support this service.

4.3.2 Planning should include ongoing budgeting even when the service is started as a pilot or with seed money from a grant.
• Resources to promote the service are available ([QuestionPoint wiki, OCLC](http://questionpoint.org))
• Annual contract allows us to cancel service at the end of the year.

## HOW TO STAFF IT?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Designate a liaison for digital reference project with clearly defined duties (RUSA, 2010, 3.4.4)</td>
</tr>
<tr>
<td>2.</td>
<td>Digital Reference Team will determine when to offer hours and how many hours per week.</td>
</tr>
<tr>
<td>3.</td>
<td>Department chair will schedule coverage as part of the reference schedule.</td>
</tr>
<tr>
<td>4.</td>
<td>We will not double book in person with online reference desk shifts.</td>
</tr>
<tr>
<td>5.</td>
<td>Online shifts should not exceed two consecutive hours.</td>
</tr>
<tr>
<td>6.</td>
<td>When no active live session is taking place, the librarian scheduled will answer follow-up questions.</td>
</tr>
</tbody>
</table>

## TRAINING

- OCLC QuestionPoint free [online training and Tutorials](http://questionpoint.org/training) & [Getting started documentation](http://questionpoint.org/documentation).
- Rich resources available on [QuestionPoint Wiki](http://questionpoint.org/wiki) (including Best Practices, Scripts, Knowledge Base, Marketing, and more.)
- Initial and on-going training should be offered to help librarians learn and retain effective online behaviors (RUSA, 2010, 3.3.6)
- Training must include practice sessions.
- Librarians should get regular shifts. If there is a long break in providing online reference service, a practice session should be offered or an experienced librarian should sit with or be available to the librarian during the first shift back.

## POLICY (What policies could look like? RUSA Guidelines, 2010)

### 3.2.1

The level of service to be provided should be defined and announced, so that staff and patrons will understand the mission of the service. Level of service includes the types of questions the service will answer (perhaps easier to define in the negative), as well as the patron population the service will serve.

### 3.2.2

Guidelines should be established for determining which queries fall outside the parameters of service, and how to respond in those cases.

### 3.3.2

Staff should exhibit the professional competencies essential for successful reference and patron services librarians, as articulated in RUSA’s “Professional Competencies for Reference and User Services Librarians.”
3.3.3 Standard guidelines of reference service (such as reference interviewing, exchange of questions between services, et al.) should prevail.

3.3.4 Staff should follow interpersonal communication practices that promote effective provision of reference service, as articulated in the RUSA "Guidelines for Behavioral Performance of Reference and Information Services Professionals."

3.3.5 Staff should be required to demonstrate skills in the effective use of online communication, as well as demonstrate awareness of the common potential problem areas when conducting reference interviews online, as compared to the face-to-face reference interview.

Other considerations:
- Include service policies such as possibly stating that articles and other online sources will not be emailed to users unless
  - They have proven that they are currently enrolled students and we therefore are not violating licensing agreements with database vendors
  - The reference transaction included teaching the student how to find the source.

- Students should know that the librarian is not their personal research assistant. Since the quality of research/sources impacts their grades, the student should be conducting his/her own research and selecting his/her own sources.
  - All service options should be listed together so the user can choose which option best meets their needs

- Librarians covering for the coop are expected to also follow the OCLC QuestionPoint policies.

**ASSESSMENT**

- Outcome Measures
  - Librarians can effectively utilize features of the system.
  - User Satisfaction – to identify the degree of satisfaction of the users. (Survey at the end of the transaction and a link on the website so there are multiple access points.)
  - How does the service contribute to student learning?

- Process Measures – to measure the effectiveness and efficiency of the process. Could include:
  - How user friendly is it for the user?
- How user friendly is it for the librarian?
- How effective is the reference interview to lead to satisfactory conclusion -- getting to the real question and helping the person get the needed information.
- What types of the questions would be better answered face-to-face (need something in policies for referral)?

- **Economic Measures**
  - How does it reach online students who otherwise would not have been served or would have been served to a lesser degree?
  - How does it serve the campus community at large?
  - How does joining a 24/7 academic coop expand our ability to reach more people than we would be able to with our current reference service hours and staff?

- **Marketing Measures**
  - How did students find out about the service?
  - Is the marketing campaign effective?
REFERENCES


ALA’s Standards for Distance Learning Library Services (2008), http://www alma.org/acrl/standards/guidelinesdistancelearning

California Community College QuestionPoint Group, http://library.miracosta.edu/content.php?pid=247893&sid=2047274

Community College Library Consortium (CCLC) on OCLC Question Point, http://www.cclibraries.org/providers/oclc.html


Mt. San Antonio College AP 4105 Distance Learning, http://www.mtsac.edu/instruction/learning/dlc/docs/AP%204105%20PDF%20from%20College%20AP%20Link%20May%202013.pdf


OCLC QuestionPoint Promotion, http://www.questionpoint.org/support/promote/promote_qp.html

OCLC QuestionPoint Wiki, http://wiki.questionpoint.org/w/page/13839446/FrontPage

RUSA "Guidelines for Behavioral Performance of Reference and Information Services Professionals" (2013), http://www.ala.org/rusa/resources/guidelines/guidelinesbehavioral


RUSA’s “Professional Competencies for Reference and User Services Librarians” (2003), http://www.ala.org/rusa/resources/guidelines/professional

RUSA Virtual Reference Resources, http://www.ala.org/rusa/vrc/resources