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## Twelve Years of Online Reference Services at Georgia Tech: Where We Have Been and Where We Are Going

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# Twelve Years of Online Reference Services at Georgia Tech: Where We Have Been and Where We Are Going

by Cathy Carpenter and Crystal Renfro

## The Beginnings

The Georgia Institute of Technology Library has been a pioneer in delivering virtual reference. The first foray occurred in 1994, when libraries were already tackling the brand new frontier of “information gateways” and librarians everywhere were discussing the hot new media storage devices — optical discs and CD-ROMS. Every savvy librarian of the day was fully engaged in discussions about internet gophers and Dialog, Silver Platter and Dynix were familiar buzz words in everyday conversation (Dusoulier 1994). Into this arena, the Library initiated an email-based electronic reference service. In the fall of 1994, Tech’s *ASK a Librarian* service received its first email question. The ASK service was immediately popular and during the first year 297 questions were received and by the second year almost 700 queries from students and faculty had been answered. (Johnston and Grusin 1995).

The Georgia Tech library firmly believes that “the contemporary academic library actively designs, implements and markets alternative reference services to meet client needs and to retain its identity in the digital world.” (Tomajko and Henson 2000, 113) To this end, the success of the *ASK a Librarian* email service prompted the library to continue innovating and in 1999 real time or virtual reference was launched. Using America Online’s Instant Messenger

(IM) chat software, the reference desk staff fielded live reference chats along with other in-person and telephone reference requests. The chat service was installed on one reference desk PC with a bell indicating incoming messages. This central location staffed with dedicated librarians enabled the library to offer reference chats for a generous 87 hours per week (Henson 2000).

## The Questionpoint Era

Over the subsequent years, virtual reference questions multiplied and during the academic 2002/03 year the Library received a total of 926 email and chat questions. At about this time, the idea of libraries offering chat reference was gaining attention nationally. The Association of Southeastern Research Libraries (ASERL) contacted member libraries to see if there was an interest in exploring online chat reference as a consortium and to offer ASERL members the ability to purchase virtual reference software at a discount. Among the fifteen ASERL libraries, Georgia Tech was the first to offer chat service. Although Tech librarians were satisfied with the library’s homegrown ASK email and AOL IM chat services, the promise of expanded features encouraged the reference committee to explore purchasing a web-based virtual reference product.

Working groups were formed among reference librarians from the ASERL

libraries and after investigating several popular subscription chat software systems, the group chose Questionpoint. Questionpoint was considerably less expensive compared to others and was supported by OCLC. It offered several features that were attractive: the ability to refer email questions to other librarians, good tracking of questions, transcripts of all chat and email questions, and detailed usage statistics. While several of the ASERL libraries decided to form a consortium to answer virtual reference questions, Tech librarians decided not to participate in the consortia because of the unique engineering and technical focus of Georgia Tech.

It was decided, however, for the library to purchase Questionpoint to use as its virtual reference system. After extensive staff training, the library switched to Questionpoint in August 2003. The library’s systems department set up an entry portal with a built-in email and chat module. Students could go to the library’s help webpage and log in with their Georgia Tech ID to either send the reference desk an email or a chat question. Because it is web based, Questionpoint can be accessed from any computer once the user authenticates through the Georgia Tech login portal.

The Library experimented with several reference staffing models before

instituting the policy that individual librarians would be responsible for answering email reference questions for their assigned day, with the evening reference librarian being the back up. The librarian could answer questions at their office computer or while working on the reference desk.

One particularly attractive feature of Questionpoint was the automatic collection of statistics. Tech librarians had been spending many staff hours compiling statistics for the homegrown ASK and AOL chat services and were dependent on the librarians remembering to log all email and chat transactions. The statistics offered by Questionpoint, in contrast, were very detailed and data could be automatically gathered for each day and for each hour of the day. This helped the online reference librarians to determine the busiest times for chat and email and illustrated the value of providing service during the overnight hours.

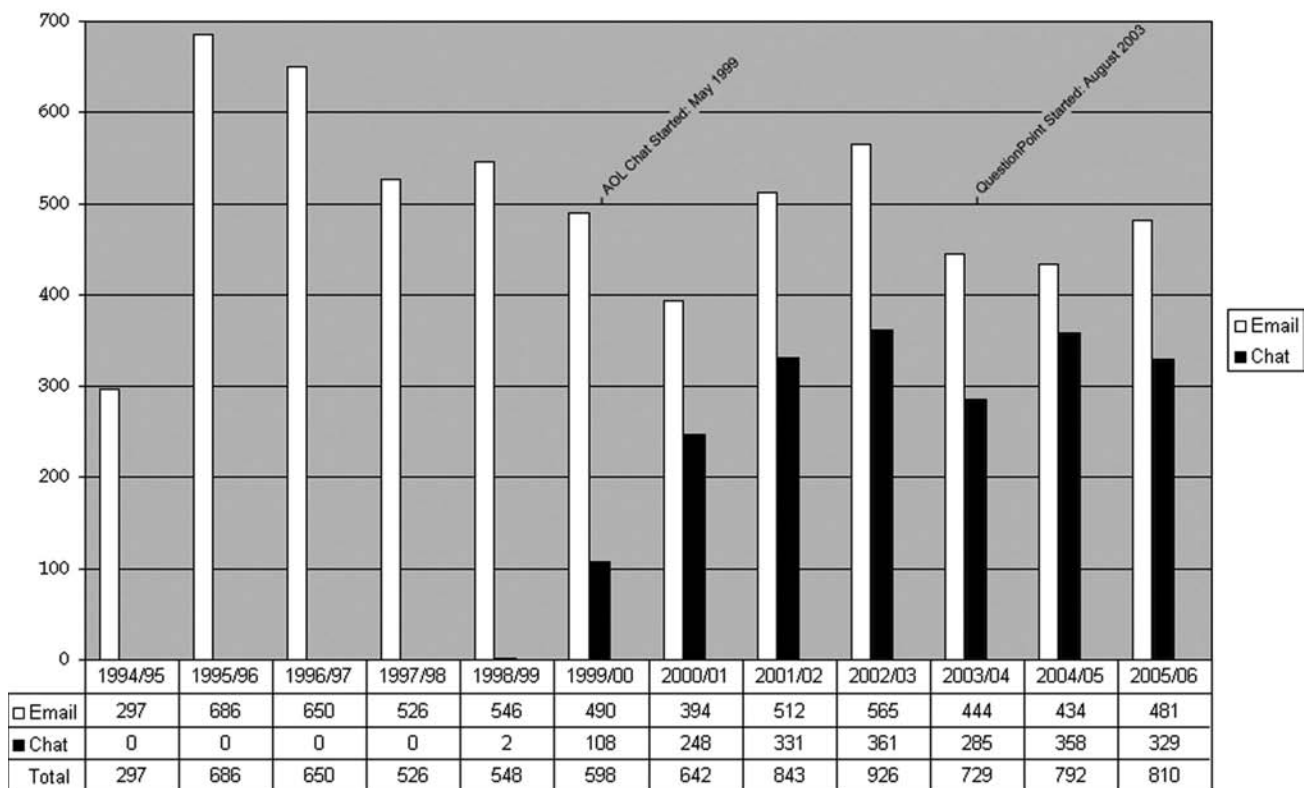
Chat service was available whenever the library was open; in total, users had access to Tech's chat service for more than 130 hours a week.

A review of the statistics also identified an alarming and recurring issue with Questionpoint Chat. Based on statistics, the reference desk was missing almost 30 percent of the incoming chat queries during certain times of the day, which resulted in the chat statistics decreasing the first year that Questionpoint was launched on campus. (See Graph 1.) There were several factors which contributed to this situation. It was obvious early on that the Questionpoint Chat experience was very different from instant messaging. Response time was slow and the reference interaction took much longer than before. Once the student or librarian entered text it could take as long as a minute or two before the text would be transmitted. This was frustrating

to Tech's students who were used to the very fast pace of IM. Many times a student would log in and before reference staff even realized there was a chat question, they would log off thinking there was no one available. Sometimes the student would then send their question using the email feature.

Incoming chat questions are answered by librarians and reference staff on duty at the reference desk. In general, staff work from one to two hours at a time on the desk, and this frequent turnover presented a coordination problem. The Questionpoint Chat window would accidentally be closed at the end of some shifts and oncoming staff were forgetting to check to see if the chat window was open. Inconsistency in the Questionpoint "new chat" audible chime and confusion over which computers had Questionpoint actively loaded also resulted in some missed chat questions.

**Georgia Tech Virtual Reference Statistics (1994-2006)**



Another troublesome factor was Questionpoint itself; the Chat feature occasionally would have problems connecting. The Chat system would be down and Questionpoint was not always diligent about notifying libraries. Frustration caused by this instability discouraged users and lowered reference staff morale. While the Questionpoint email system seemed to be working well, chat transactions never returned to the record levels the library experienced the year before Questionpoint was introduced.

### The Instant Message vs. Web-Client Debate

As Tech librarians continued to work through the various problems introduced with Questionpoint Chat, the reference committee watched with interest as several other libraries began to follow in Tech's earlier footsteps and institute instant messaging reference services at their

libraries. One distinct advantage these libraries had over Tech's older homegrown system was the use of new aggregator products such as Trillian and Gaim. These products allow libraries to receive chats from multiple IM platforms without requiring the user to download any special software other than the IM client that he or she already used. The pilot libraries reported notable success using these low-cost and intuitive products.


The debate of web-based vendor systems versus IM aggregators seems to be popping up everywhere these days. When comparisons between web-based chat systems, like Questionpoint and instant messaging are evaluated, some arresting facts show why IM is gaining in popularity on many reference desks (Houghton and Schmidt 2005).

- ▶ One very attractive point of comparison for library directors is

cost. IM aggregators like Trillian and Gaim are available at a nominal, if any, cost compared to a possibly hefty annual renewal cost for commercial products.


- ▶ The reference transaction is much faster with IM. There are no introductory entry forms, no unfamiliar chat screens for the user to navigate. Users obtain the library's "buddy name" and use their IM service of choice.
- ▶ Once the student contacts the library for help, the library can easily be included, along with all their other "buddies" on their IM screen for easy access and a visual reminder of help being only a click away.
- ▶ The technology of the aggregator programs is simple for library systems departments to install and technical problems are reduced. Many web-based chat programs bog down if browsers

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other than Internet Explorer are used and they often are incompatible with standard anti-spamware and firewall software.

- ▶ The simplicity of the IM product makes librarian training less arduous than with web-based clients.
- ▶ The IM user does not have to disclose personal information, while the web-based software usually requires the user to fill out a form with contact information. While the IM user has better control of his/her personal information, this does limit the librarian's ability to follow-up later.
- ▶ One drawback to using IM is that statistics are not as well developed with IM aggregator products as with the web-based chat programs.

These discussions surrounding instant messaging reminded Tech librarians what had been learned earlier from the Tech community: students like instant messaging. In fact, the Pew Report on IM use suggests that while about 12 percent of U.S. adults use IM on a typical day (Shiu 2006), closer to 84 percent of online teens between the ages of 15 and 17 actively use IM on a regular basis. Additionally, this same teen group identified IM as the preferred method of communication over email by 50 percent (Lenhart 2006). The message was clear. Tech users wanted IM and the library needed to respond.

### A New Day Dawns

Due to continuing problems with Questionpoint Chat, the Tech Library chose to discontinue that service while maintaining the Questionpoint email system. During July of 2006, Tech premiered its new IM chat service. The aggregator of choice was Trillian, which supports AOL, MSN, and Yahoo IM clients. The free

version of Trillian had already been distributed to computers throughout the Library and was familiar to many of the Tech Library staff. An upgrade to the Trillian Pro version (\$25 annual subscription) allowed Tech librarians to take advantage of the more robust statistical features and the ability to later add Google IM to the chat offerings.

The Tech reference desk typically is staffed with at least two librarians. To circumvent the earlier confusion of missing incoming chat questions, the Library chose to launch the IM chat service loaded on only one reference desk computer and to assign a librarian each hour to sit at this computer and take all IM chats along with other telephone and in-person reference assistance.

Early feedback from Tech librarians is encouraging, as is their enthusiasm over the chat changes. The library is optimistic that this new service will result in increased library usage and that it will serve as a positive outreach to university users. It is ironic that the Tech library has come full circle. The library started its first virtual reference service using AOL chat and now is returning to instant messaging once again.

### Lessons Learned

Over the past twelve years, the Georgia Tech library has had significant involvement in the online reference revolution using both email and chat. Through it all, Tech librarians have learned invaluable lessons. Some of the lessons learned thus far are:

- ▶ Users don't want to download clients onto their computer to use a library feature.
- ▶ Users won't come back if the service is slow, out of service, or sporadic.
- ▶ Users want service from their

desktop, integrated with their work.

- ▶ Users want the ability to multitask... They don't want to have to use the phone to call us while they are online.
- ▶ Users want immediate answers.
- ▶ The new generation of students are on IM. The academic library needs to be where they are.

Georgia Tech Library is now taking full advantage of current reference technology and applying the "lessons learned" in order to best serve our community of users. ▶▶

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