Marketing Virtual Reference Cooperative Pilot

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NARRATIVE DESCRIPTION

1. Summary/Introduction
The Virtual Reference Cooperative Pilot was initiated in December 2001, at the University of Colorado Health Science Center's Denison Library.   The intent of the project was to utilize virtual reference software (24.7 Reference) to develop a cooperative region-wide network to respond quickly to requests for reference support services from network members and helath professionals throughout the midcontinental region.

Denison Library began the service with 2 hours of coverage. Soon after, the J. Otto Lottes Library and the Spencer S. Eccles Health Sciences Library joined as new partners and expansion of the service window eventually extended to 8 hours of coverage.

Approximately 30 questions per month were answered within the region, with the primary clientele being the faculty, staff and students of the libraries staffing the service.   A website was created for the participants at *http://denison.uchsc.edu/mary/Vref.html*. It includes the policies and procedures manual and statistics.

In the second phase of expansion, the Harley E. French Library of the University of North Dakota and Hawaii Medical Library joined the cooperative. The Hardin Library for the Health Sciences of the University of Iowa and the Carlson Health Sciences Library of the University of California at Davis followed soon after bringing the total number of health sciences libraries to seven. Coverage was expanded to twelve hours.

The group then began the implementation of a marketing plan which would encourage all libraries in the region, including health sciences and public libraries, to use Virtual Reference to support their health information services. Representatives from each of the participating institutions formed the planning group.

Accomplishments
- Expansion of the cooperative to seven health sciences libraries
- Creation of a brand name, **Ask A Medical Librarian**
- Purchase of a domain name for a ten year period, AskMedLibrarian.org and AskMedLibrarian.com
- Creation of a logo and bookmark

2. Geographic region
- Colorado - all counties with medical librarians who are members of the Colorado Council of Medical Librarians and one county in Wyoming
- California
- Hawaii
- Missouri - counties through the web link at MedlinePlus GoLocal
- North Dakota
- Utah

3. **Collaborations/Partnerships**
   - Beginning in 2003, Colorado partnered with the State public library virtual reference project, Ask Colorado. Although the Ask Colorado service is highly successful, very few medical reference questions are being forwarded to Denison Library.
   - Colorado also marketed the VR service to the members of the Colorado Council of Medical Librarians. There was very low use of the service. In one instance, the VR cooperative assisted a hospital library by providing reference service coverage through VR when the sole librarian was absent for a few days due to attendance of the MLA annual conference.
   - Missouri partnered with the NLM to provide a virtual reference link in the MedlinePlus GoLocal resource.

   Challenges and lessons learned
   - In the academic medical environment, the percentage of the population who are early adopters of new technology is quite low. Busy research faculty have little time to keep up with the latest technology and the predominant means of online communication is still through e-mail. Marketing efforts had very low returns.
   - It was also discovered that librarians in general have a culture of competence that is not amenable to referring questions to other librarians. Although the VR cooperative was offered as a service to expand access to resources by hospital librarians through the referral of reference questions, that, in fact could not and did not happen very frequently. Of the 399 session provided in 2004, only 24 sessions were from librarians in the community with some using the service more than once. Anecdotally, it also appeared that consumers who had complex health questions either opted to visit the medical library in person on their own or were referred by their local public librarian.
   - The complexities of online product licenses and disparate authentication systems among the universities for allowing access to those products posed another challenge. Achieving a high level of quality and customer satisfaction in answering questions related to access to online resources from students outside the home State was challenging or impossible.
   - Lastly, the VR project was funded at a level that did not include a separate server for the exclusive use of the cooperative. As such, proprietary information databases could not be shared and co-browsing between a clientele from one library paired with a librarian from another State was impossible. Additionally, the co-browsing feature of the 24/7 software did not perform as well as it should have. Thus co-browsing of free resources such as PubMed was sometimes a challenge as well.

4. **Training**
   - All librarians of the 7 states were trained to use the 24/7 VR interface and of any upgrades. Training was conducted in person by 24/7 personnel or in online sessions.

5. **Training sites**
   - Training was either provided on-site at each library or virtually, in online sessions.

6. **Exhibits**
   - The cooperative did not exhibit at any conferences or other professional meetings.

7. **Resource Materials**
   - A logo and bookmark were developed.
   - A resource website was developed for the use of the VR Cooperative librarians. It included links to quick and basic information about each of the libraries which would assist librarians in answering questions specific to the individual libraries. Because the VR Cooperative ended in March 2006, the website is no longer available.

8. **Web sites:**
   - Please see note above in #7.

9. **Document delivery and reference services**
   - Document delivery was not provided.
   - Reference Services statistics:
     2003 – 504 sessions
     2004 – 399 sessions
     Jan – Jun 2005 - 545 sessions

10. **Approaches and interventions used**
    - Identifying and scheduling sessions: NA
    - Promotion/marketing: marketing the service included flyers, bookmarks, articles in campus newsletters, promotion in library instruction sessions, a message attached to e-mail signatures, in library handouts, promotions at professional meetings and links to the service through each library's website.
    - Training: Please see #4 above.
    - Personnel/staffing: Includes all librarians and staff who provide reference services throughout the seven participating libraries.
    - Web site development: Please see #7 above.

11. **Evaluation:**
    - Three methods of evaluating the service were built in or provided by 24/7:
      - Usage data automatically collected and reported by 24/7;
      - An external data collection tool created by Denison Library for the cooperative which measured –
        1. 24/7 feature used
        2. Nature of the question
        3. Whether the customer needed to be referred back to their home library
        4. Patron type
        5. The type of resource used
        6. Whether a follow-up via phone or e-mail was needed; and
      - A customized user feedback form.
    - Results:
      - Statistically, it appeared that the service was finally beginning to take hold in 2005 among the primary clientele of each university.
      - User feedback indicates a high rate of satisfaction among those who took the time to respond to the feedback survey. In 2004, 52% of users responded; 81 % strongly agreed that they were satisfied with the answer they received; 65%

strongly agreed and 20% agreed that the service should be continued; and 68% either agreed or strongly agreed that it saved them a trip to the library. However, in some instances comments indicated dissatisfaction from customers who were either confused that their home librarian was not the person on the other end of the VR interface or dissatisfaction with the inability of the out of state librarian to answer the question that was very specific to the home library.

o All objectives of the project were met:

1. A representative of the Virtual Reference libraries attending the Virtual Reference Conference.

   Completed – Sandi Parker attended the Virtual Reference Desk 2003 National Conference Nov. 17-19, 2003.

2. Revising the policies and procedures manual to include criteria for selecting participating libraries, training staff, and incorporating libraries into the staffing schedule.

   Completed.

3. Increasing the number of libraries supporting this service by at least three.

   Unsuccessful – within Region 4. Successful in adding four other libraries out of Region 4.

4. Coordinating the merger of the MidContinental and Hawaii/North Dakota virtual reference services.

   Completed.

5. Orienting staff of the new libraries and incorporating them into the schedule.

   Completed.

6. Determining an official name for the service.

   Completed – Ask A Medical Librarian.

7. Obtaining a domain name that is easily recognized.

   Completed – AskMedLibrarian.org and AskMedLibrarian.com.

8. Creating a logo for the service.

   Completed.

9. Providing resources to market the service to a library's own staff when the library is preparing to come up on Virtual reference. This is so that everyone in the library understands the new service and can appropriately promote it.

   Completed.

10. Creating a promotional item that can be distributed at meetings and conferences by the participating libraries and RML staff. This may be a brochure or a bookmark. It will include the logo, the URL and a brief description of the service.

    Completed.

11. Evaluating the effectiveness of the marketing efforts.

    Completed.

12. Evaluating the success of the merger of two virtual reference services.

    Completed.

13. Beginning discussions regarding funding the service in future years.

    Completed – The GMR contributed significant funding for the VR Cooperative in 2005. No funding was available beyond that time frame and in an analysis of ROI, the Cooperative decided to terminate the Cooperative in favor of transitioning the service to Instant Messaging because of the lower or null cost for the software interface.

12. Problems or barriers encountered
- Promotion/Marketing – none
- Training – none in the use of the VR software. Challenges of training librarians to be familiar with the technology issues of access to online resources in other states exist with no easy solution to the problem. Customers appear less satisfied with encountering librarians out of State.
- Equipment/telecommunications – the co-browsing feature of the 24/7 software was not reliable. Insufficient funding to acquire a server for the VR cooperative created barriers to using proprietary databases.
- Personnel/staffing – none
- Web site development – none

13. Continuation plans
- The 24/7 company was acquired by OCLC Question Point. The cost for licensing the interface increased significantly and none of the libraries had the budget to support the service without external funding. The libraries all set up Instant Messaging services. Some libraries decided to continue in a cooperative model and other libraries decided to provide the service independently. The libraries had implemented an e-mail discussion list and all libraries continue to belong to the discussion group to continue to support each other in efforts to provide digital online reference services.

14. Impact
- Usage of the service was fairly low in the academic setting as compared to Public Library Virtual Reference initiatives. Therefore, ROI for the library, institution, and consortium was minimal as compared to the significant amount of time and resources dedicated to the project.

- The networking of medical librarians across 7 States was one positive outcome. Many have expressed appreciation of that experience and continued access to each other as professional resources. The project has laid the groundwork for future collaborations among these resource libraries.

15. Recommendations for improvements
- None since the VR cooperative has terminated in favor of exploring other chat technologies.

<u>FOLLOW UP QUESTIONS</u>

1. Were your original project goals and objectives met? If not, why not?

   All project goals were met.

2. What significant lessons were learned which would be of interest or use to others conducting outreach projects? Which strategies were the most effective in implementing the project?
   - Outreach projects to community librarians need to take into account librarian pride and the culture of independent competency;
   - Collaborative projects among libraries of different institutions must take into account technology based differences and barriers; and
   - Projects need to be funded sufficiently to allow goals to be met.

3. If you were to start all over again, what, if anything, would you change about your goals, project plans, etc.?
   - Due to the fast paced changing technological environment, chat reference goals centered on any particular technology need to be more limited in scope; and
   - For long term chat reference goals, objectives for future technology changes need to be anticipated. As an example, chat reference goals might have taken into account Instant Messaging and Text Messaging as future iterations of the virtual reference service if those iterations were foreseeable.

4. What advice or recommendations would you give to anyone considering a similar outreach effort?
   - Stay abreast of new technologies;
   - Stay abreast of the literature on the subject; and
   - Perform a needs assessment on the population you will be deploying the outreach service to.