cn u hlp? Collaborative Chat Reference and Instruction

How would you answer:

a) Where/how do I access the online articles? [for WR39C]
b) Where can I find great research on global warming?
c) Where is "SCI Bar" [UC Irvine]?
d) I'm looking for MMW table in Geisel Library. [UCSD]

Anticipatory set – how would you answer these patron questions with whatever your chat reference experience (none, single campus, multi-campus collaborative)?

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- Ken Furuta, Reference/Information Technology Librarian, University of California, Riverside. I was the UC systemwide co-chair of the Ask a UC Librarian group when we implemented the service.
- I'm Gayatri Singh, Reference and Information Services Coordinator, @ UC San Diego, I'm one of the librarians who staffs the service. We're going to look at chat reference, how instruction fits in, then look at the UC collaborative service

Chat reference is a reference service.
RUSA defines reference transactions as "information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular

information needs.   Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements."

So it's excluding formal instruction, but it leaves room for informal instruction. Ref lib have long understood the need for inst during reference transactions. In addition, The ACRL Information Literacy Competency Standards for Higher Education also calls for students who can determine, access, and evaluate their information need (ACRL, 2000).

In addition to library instruction in classrooms, these guidelines can be applied to the virtual space as well. By showing students how to determine/access/evaluate info needs during chat ref we can extend the learning space into the virtual world.

But how does this learning space get affected when the service is provided by a consortium– when the librarian and the user are on different campuses? This presentation will look at the Ask a UC Librarian chat reference service and how instruction is and can be supported.

Slide 3
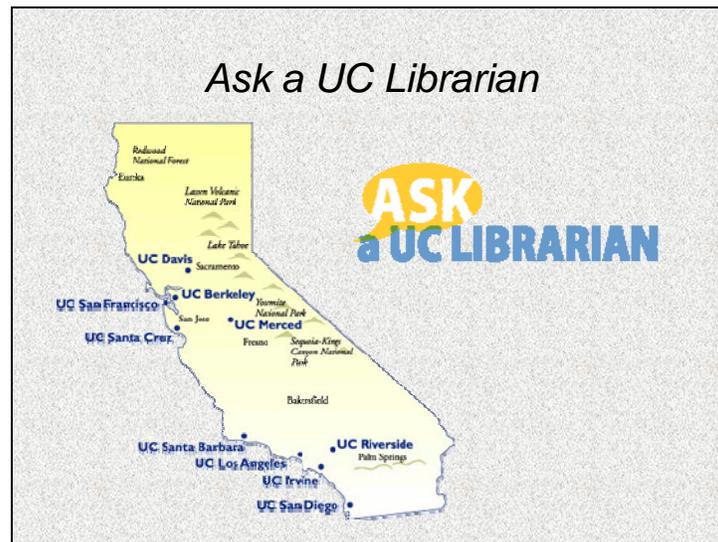
About the collaborative:

- The University of California system encompasses 10 campuses located through out the state. The system has 220,000 students and 170,000 faculty/staff members.
- It's a little more that 500 miles between the most southern campus, San Diego, and the northernmost, Davis & Berkeley.
- The Ask a UC Librarian collaborative reference service started in November, 2006 using the QuestionPoint platform.
- 50 hours of service provided per week over 7 campuses. All 10 campuses have links to the service.
- Daily staffing of the reference queue rotates through University of California campuses.
- From September 2007 through January 2008 we averaged around 120 questions a week when all campuses are in session. The average chat transaction was 13 minutes & 33 seconds in 2007.

- Users by patron "status": Undergrad – 1281 (47.51%); Graduate - 611 (22.66%); Non UC – 361 (13.39%); Staff – 190 (7.05%); No entry – 129 (4.78%); Faculty – 124 (4.60%).
- For Jan-March 2008, we had Reference: 577 (37%) – we defined as "assisting the caller with locating subject information." 2nd highest - "access" (30%), which are those about "access to electronic resources ... circulation and directional issues."

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Of course there are advantages to providing a service through a consortium– the main one being that you can provide more hours of service with less staff time. For the 2007/2008 schedule, the max contribution for any campus is 10 hours, and that's with providing 50 hours/week. Some of the feedback we get from user surveys, is that they want the service to be open more, great way to provide that

There are also advantages due to the fact that the consortium is comprised of campuses within the same system.

The UCs also collaborate with their collections, and we subscribe to a core set of databases. So for example, for our general multidisciplinary database, we all have access to Academic Search Complete. Since we don't offer the co-browse feature this allows the librarian and the user to search the same source at the same time, and the lib can still lead the user through the research process.

The UC system also shares some of the same terminology. UC eLinks is the systemwide implementation of Ex Libris' reference linking software product (SFX).

There are services/terminology that are similar across campuses.

Disadvantages of the collaboration revolve around assisting patrons from another campus to the same level of service that those on the home campus enjoy.

To give you an example of some of the things we're dealing with, many of your campuses offer a way for student to access your online resources from off-campus. Show of hands-- proxy, vs. Web VPN, vs. client VPN.

Some campuses have e-book packages– NetLibrary vs. MyiLibrary

Another challenge can be campus specific jargon. One example is Class numbers/names: what is your freshman composition? For example, freshman composition can be English 1, or English 5, or Writing 10, or Writing 39.

Assisting with resource selection and leading a patron through a search can be difficult if the chat provider doesn't have access to the same online resources as the patron.

That all brings new meaning to the question, "Where/how do I access the online articles?" – From Irvine - WR39C. Parts of the question: Are you on campus or off; If so, what campus (Irvine); How do they recommend off campus access; What is WR39C? That's in addition to the basic reference interview.

Slide 5
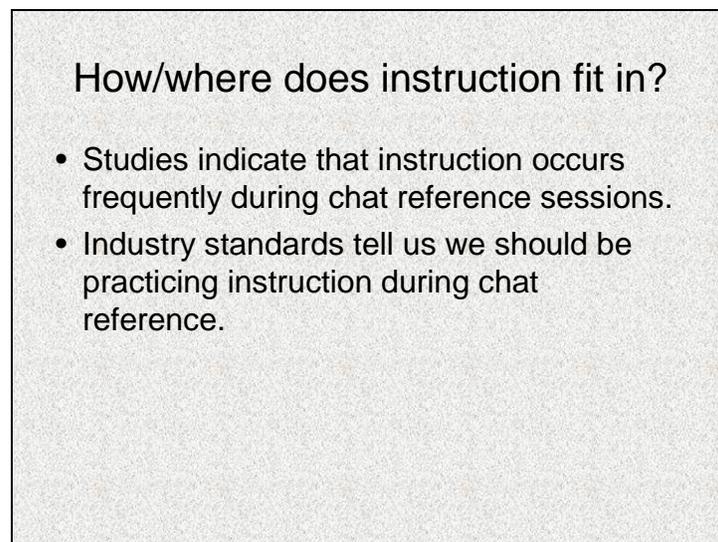
How/where does instruction fit in?

- Studies indicate that instruction occurs frequently during chat reference sessions.
- Industry standards tell us we should be practicing instruction during chat reference.

Does Instruction happen in chat ref? Is it possible?

See Handout for a complete bibliography – only highlighting some articles here

Patricia Johnston (2003). "Digital reference as an instructional tool: Just in time and just enough." Johnston's review of the University of Brunswick's digital reference service found "60% of queries contain some instructional element" (p. 31).

Lesley M. Moyo (2006). "Virtual reference services and instruction: An assessment." Moyo's (2006) analysis at Penn State documented that at least one instructional element occurred in 86% of chat reference transcripts (p. 225). She further found that 66% of the transcripts contained more than one element (2006, p. 225).

Lisa A. Ellis (2004). Approaches to teaching through digital reference.
Looking at ACRL Information Literacy Competency Standards, Ellis (2003) found that Standard Two, "access the needed information effectively and efficiently" was present in 62% of the chat reference transcripts (p. 110).

What type of instruction is happening?

Stephanie J. Graves, Christina M. Desai (2007). "Cyberspace or Face-to-Face: The Teachable Moment and Changing Reference Mediums."
Graves and Desai (2007) analyzed transcripts to identify the type of instructional method observed in IM, chat, and at the reference desk. They found "Resource Suggestion (librarian suggests print or electronic resources)" and "Leading (librarian leads the patron step by step to the needed information)" were the top two instructional methods observed in chat reference (2007, p. 13-14).

Not only is instruction happening, but users are open to it!

Stephanie J. Graves, Christina M. Desai (2006). "Instruction via chat reference: Does co-browse help?"
An earlier Desai and Graves' (2006) study showed that students are open to receiving instruction in this format. When asked whether they "wanted the librarian to teach them how to find information for themselves," 82% of the respondents marked "Definitely" or "Would be nice" (Desai and Graves, 2006, p. 16). The main users of academic libraries' chat reference service are students, so they might be more open to instruction due to the academic environment.

Slide 6
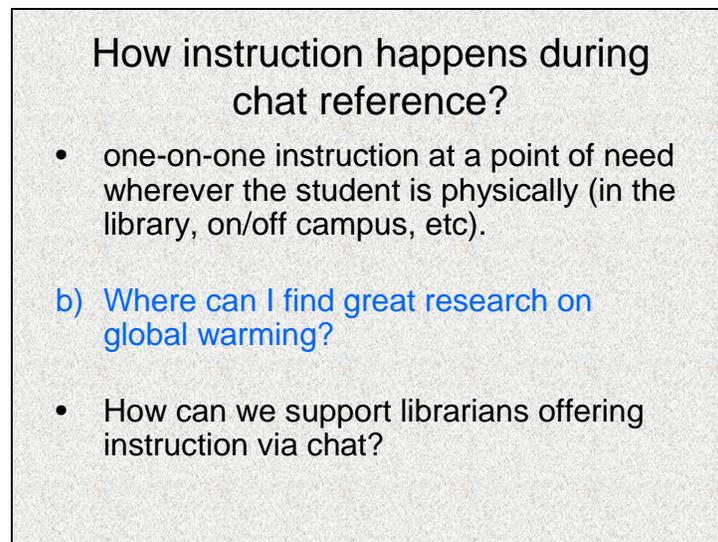
> # How instruction happens during chat reference?
>
> - one-on-one instruction at a point of need wherever the student is physically (in the library, on/off campus, etc).
>
> b) Where can I find great research on global warming?
>
> - How can we support librarians offering instruction via chat?

Our experience reflects many of the studies listed above. Further, the sessions are at the student's point of need. Instructional opportunities have ranged from database selection, crafting a search strategy, using Boolean operators, evaluating the results, to retrieving the full-text using UC-eLinks.

For the question on global warming, the teaching moment includes defining "great research," as scholarly research, scholarly vs. Internet, what the peer-review process is, resource selection, using UC-eLinks, etc.

The studies in the literature review are all research on individual libraries. What about supporting instruction for all students in a collaborative chat reference system? There are some tools that help.

Slide 7
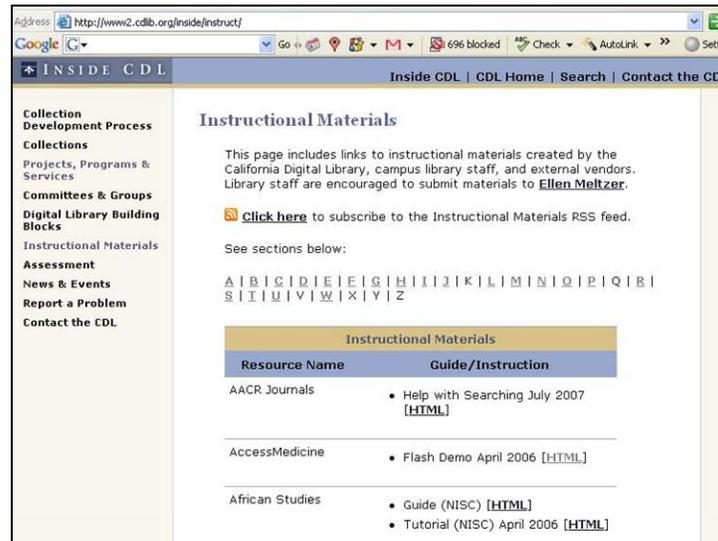
- The California Digital Library (CDL), a UC Library under systemwide administration, created a central repository of print and online guides to databases. The tutorials are created at all the UC campuses. We can use or offer these guides as instructional tools.
- Since students can get a copy of the transaction, offering URLs of online tutorials or class guides are an efficient way to extend instruction after the reference chat has ended.
- CDL help guides - http://www.cdlib.org/inside/instruct/

Slide 8
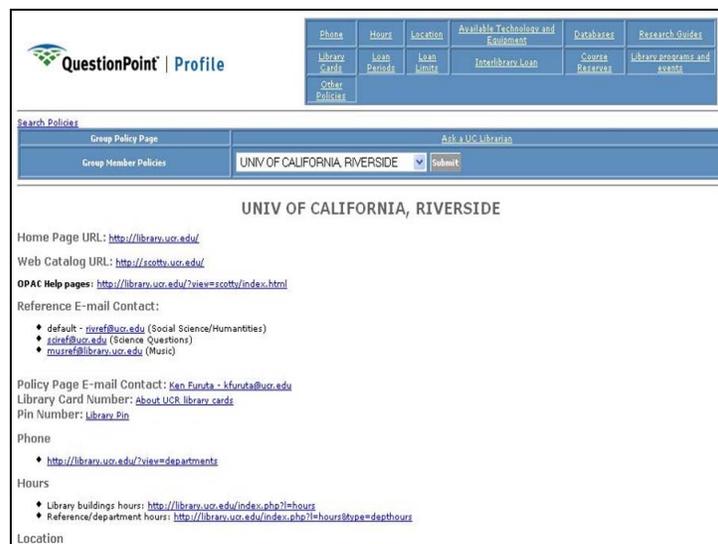
QuestionPoint allows each campus a web page, referred to as a "Policy Page." In many ways, they are like FAQs.

The pages are a list of links to basic information like hours, remote access, databases, subject guides, etc.

Each campus can also customize "scripts" (not shown on slide) with text responses to common directional or access questions. Using them leaves more time for the reference interview, which can lead to an opportunity for instruction.

Slide 9
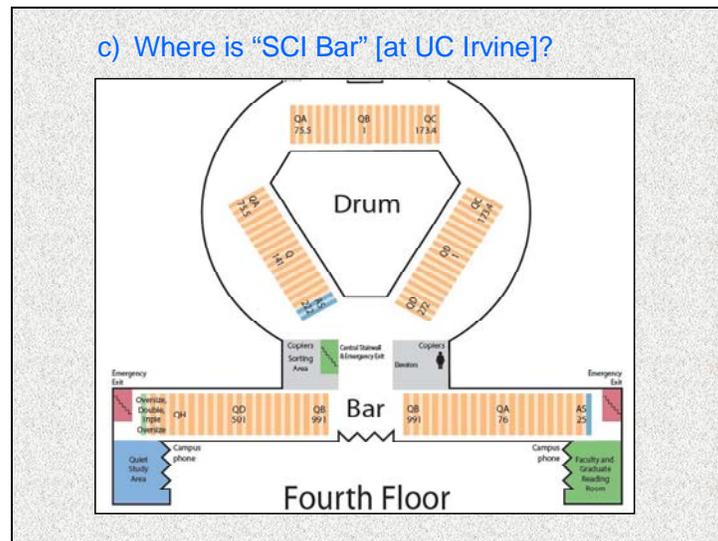
The question, "Where is 'SCI Bar'" is about campus specific locations. The architecture of the Science Library at UC Irvine has a round section (named the "Drum") connected to a rectangular section (known as the "Bar"). Journals are shelved on the Drum, monographs in the Bar. In this question, knowing where to access specific location information for each campus served is important.

What about "assignment alerts"?

We needed to find a way to share information about class assignments and any guides or pathfinders created specifically for these classes. The UC librarians are taking advantage of and exploring new tools to help this type of communication.

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d) I'm looking for MMW book in Geisel [UCSD] Library. Where can I find them?

	Blog	Wiki
Authorship	➢Single or limited number of authors.	➢Open to collaboration, thus better for large groups. ➢Info can be changed/deleted by anyone
Display	➢Time oriented - newer posts at the top (news ticker).	➢Old content is displayed next to new. "Flat" pages.
Strengths	➢Better for alerts & RSS feeds.	➢Sharing ideas, e.g., working on an assignment. ➢Dynamically build documents with many contributors.

Table based on e-mail between Phoebe Ayers & Ken Furuta (UC Davis), Feb. 14, 2008.

MMW = Making of the Modern World @ UC San Diego. The class is scheduled every year. Librarians have prepared a class wiki and set aside common books for the assignment. However, because the assignment is unique to UC San Diego, other UC librarians may or may not know about that preparation.

- We needed to find a way to share information about class assignments and any guides or pathfinders created specifically for these classes. The UC librarians are taking advantage of and exploring new tools to help this type of communication.
- That is partly because we are not party to staff meetings or informal conversations between staff in their home libraries.
- In your experience you know that information passed along includes assignments are heavy at the reference desk and the best resources for them.
- Information in the last category would be especially useful to distant UC chat librarians who are also helping your patrons.

Solutions:
- One solution for passing assignment alerts along is to use the virtual reference system itself.
- Recently students in an UC Riverside undergraduate research methods class had a due date coming up.
- One author (Ken – UC Riverside librarian) got a heads up that they were using *Ask a UC Librarian* (K. Andrews (UC Irvine), personal communication with K. Furuta, January 14, 2008).
- The quickest solution was to log into chat as a patron to give a heads up and tips to the librarian on duty (it was due the next day).
- In retrospect, a better method would have been to broadcast the alert to everyone staffing the service well in advance of the night before the due date.

Background:
- We had a listserv when we began the service.
- It was used to communicate shift reports, assignments, tips, techniques, etc.

- But there was a strong desire to use it only for official communications.
- Too much info coming in (think about the daily email you get…)
- New online tools allow librarians to share information efficiently, but in a space where they can access the information only when they want.

Let me talk about some solutions & then see what you think.

Blog vs. Wiki:
- Authorship - a blog is personal, with little collaboration and the posting is owned by the poster. Whereas a wiki can be personal, but is open to collaboration (access via password). Any information can be changed or deleted by anyone.
- Layout – A blog's journalistic style catalogs and dates content so readers can see the interchange of ideas related to the blog topic in question. A wiki is a continually modifiable easy-access web page.
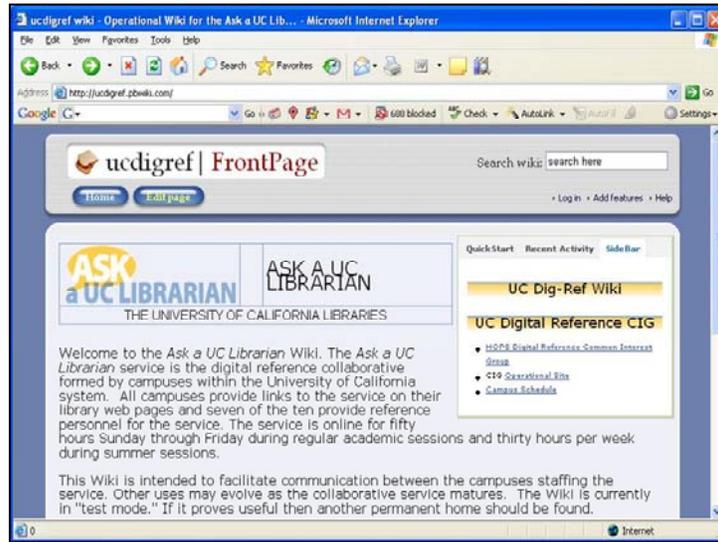- Therefore, each has different strengths/potential uses.

(Table content based on an email between Phoebe Ayers (UC Davis) and Ken Furuta)

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Note features: RSS, archive by date, & categories. We could use the categories to identify the campus and type of posting (assignment alert, technical issues, etc.)

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Sample Wiki page.

- Because each platform has differing strengths, we can envision using both.
- Both are searchable.
- A Wiki could be used to develop and save bookmarks to: a) sites for answering commonly asked questions; b) collaboratively develop and display consortium-wide policies.
- Taking advantage of the "news ticker"/time sensitive display, A blog could be developed for: a) assignment alerts; b) problems with databases to. In addition, staff could set up RSS feeds to quickly check for new content.

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How would you answer:

✓ Where/how do I access the online articles?
✓ Where can I find great research for political agreements on coffee trade?
✓ Where is "SCI Bar" [at UC Irvine]?
✓ I'm looking for MMW book in Geisel [UCSD] Library. Where can I find them?

Review of questions - The approach is different if you are thinking about patrons in just your library, or in a consortium of libraries.

Online articles – where are you, on campus or off, & what campus?
"Great research" = "peer review," "UC-eLinks," database selection, etc,
SCI Bar = campus specific locations.
MMW – what are we each doing to help our own students? How can we include everyone staffing the service?

Closing:

What do you think?

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