

Members Council February 2003
Interest Group
Discussion Summary Report - DRAFT

Name of Group Cooperative Reference

Recorder Sonya Oliver

1. Summary of topics & discussions

February 10, 2003

QuestionPoint Update and Report from a QuestionPoint Library. Meredith Dean, QuestionPoint Marketing, facilitated a presentation by Linda White, Public Services Collections, Library of Congress (on the phone), about the Library's use of QuestionPoint. The presentation was arranged in response to the Interest Group's request to hear about QuestionPoint from an active user of the service.

LC views QuestionPoint as an excellent tool to help them expand reference services beyond face-to-face contact with users in its reading rooms. It also helps them serve younger researchers who do not meet the age requirements to enter the LC reading rooms. LC staff continues to monitor usage statistics and trends that affect online reference service, so they can make modifications as needed. For example, since they repositioned the "Ask a Librarian" buttons on screens throughout their web site, more people have used the service. The staff is fine-tuning its online reference techniques, but overall feels that online reference has elevated the quality of the reference questions they receive. LC appreciates OCLC's responsiveness to their suggestions for improvements to QuestionPoint.

Interest Group questions and discussion focused on the following areas:

1. Effect of online reference via QuestionPoint on library staff
 - a. Staff are busier than ever
 - i. While in-person reference numbers decline, online reference is increasing rapidly.
 - ii. Online reference questions tend to be *real* reference questions vs. questions related to use of technology or directions.
 - iii. Staff schedules are shifting to fewer hours on the public reference desks and more hours working with online reference.
 - iv. Digital reference tends to take time away from collection development work.
 - b. New reference librarians have been hired for a "Digital Reference Team" to lead the online reference effort. In addition, many existing staff members are moving into online reference. Linda noted that all not all librarians are comfortable with online reference.
2. Staff training on QuestionPoint and online reference
 - a. Training has included guest speakers such as Ann Lipow, Director, Library Solutions Institute and Press, and Joe Janes, University of Washington, as well as topical sessions such as "chatiquette".
 - b. LC has used online training in conjunction with OCLC, and is currently working with FEDLINK, so the regional service provider can assume QuestionPoint training.
3. Access to QuestionPoint through the OCLC LIS Education Program
 - a. Interest Group members applauded the availability of no-charge QuestionPoint access to library education programs.
 - b. One member commented that current staff might be more willing to adapt to online reference when they know that recent graduates will have skills in this area upon completion of their graduate programs.
4. End-user awareness of global reference network use for reference questions
 - a. The extent to which end-users are aware that their questions have been referred to the global reference network for assistance depends on local library practice.
5. 24x7 reference coverage
 - a. Several group members are very enthusiastic about being "on all the time" to their users through a virtual reference service.

Overview of the WorldCat Library Access Cooperative Concept and Research. Bill Brembeck, Product Manager, Open Access Services.

OCLC is currently researching ways to make libraries more visible on the Web. One option under consideration is a "public view of WorldCat" that would link from well-known web sites to WorldCat to help web users identify materials in libraries. Once connected to WorldCat holdings data, users would have the option to link to a library site or catalog for additional information. The "public view" would include less bibliographic information than what currently displays in WorldCat on FirstSearch.

The business model that is currently under investigation includes selling the service as an add-on for libraries that already have WorldCat access. Holdings information will display for only those libraries that purchase access; however, the general public would have access to the brief record displays without holdings data. Research is now underway, and the business plan is scheduled for presentation to the OCLC senior leadership team in March. If approved, development would proceed, working toward a target release date of January 2004. Further information will be shared in a presentation to the entire Members Council in May.

Library access cooperative discussion topics included:

1. Purchase options and pricing
 - a. Members asked for clarification of the relationship of the new service to the existing Base Package on FirstSearch. The current plan is that the Base Package will continue to be available, with the option of purchasing the new service as an add-on.
 - b. Members suggested that some libraries might use the public view instead of purchasing WorldCat access through FirstSearch in order to save money.
 - c. One member suggested that some smaller libraries might subscribe to the public view if not required to purchase access to the full WorldCat on FirstSearch first.
 - d. Members expressed concern that libraries facing extreme budget cuts at this time might not choose to purchase the service.
 - e. Pricing for consortia would be desired
2. The group requested updates on research progress
 - a. Tam will include updates in the monthly updates she prepares for the group.
 - b. This topic is to be discussed at a council-wide session at the May meeting.
3. Visibility of individual libraries included in a consortium purchase.
 - a. Individual libraries would still want their collections to be visible to users, even if their consortium purchases access.
4. How much information will be included in the "public view"?
 - a. Minimal information will display, such as author, title and holdings (for libraries that pay for this).
5. How will the new service vary from the current FirstSearch service?
 - a. The plan is that it will look somewhat different and that it can be co-branded by libraries.
6. Terminology recommendation.
 - a. The word "delivery" is more recognized outside the United States than "fulfillment".

February 11, 2003

WorldCat Update: Including pop-up survey results and their use, and online user surveys for other OCLC services. Deb Bendig, Manager, Discovery View of WorldCat and Lori Saviers, Senior Manager, Global Business Research

Lori Saviers provided some background on the recent pop-up survey of users of the WorldCat database on FirstSearch. This work was done to complement the ongoing feedback OCLC receives from librarians with feedback from non-librarians *in addition to* librarians that use WorldCat. This was a trial of survey support from the Foresee organization. In this survey, overall satisfaction with WorldCat ranked quite high on the American Customer Satisfaction Index, with public library users displaying the highest levels of satisfaction. OCLC values the data that this type of pop-up survey delivers, but may not be able to afford regular surveys for all key OCLC services. Lori solicited input from the group on suggestions for future survey activity.

Deb Bendig discussed WorldCat changes mentioned in the survey results that either have been made already or are scheduled for implementation. In addition to confirming the appropriateness of many planned enhancements, the survey also provided sufficient data to inform decisions about additional WorldCat changes. Deb also distributed a list of categorized comments from the survey respondents.

Discussion on this topic included:

1. Link to Local Data Record (LDR) data from WorldCat records.
 - a. Librarians and end-users are pleased to have access to this detailed information from WorldCat records.
2. OCLC member input about pop-up surveys.
 - a. A member suggested that OCLC survey the membership to find out whether any member libraries can share expertise about pop-up surveys.
3. Librarians' perception of pop-up surveys.
 - a. Lori polled the group for their views of pop-ups. Three members block pop-up surveys in their personal work at this time, but no institutions represented in the group employ pop-up survey blockers on an institutional level.
4. Suggestion that OCLC continue to survey users randomly and give users an opt-out option on all surveys of this kind.
5. Target audience for survey
 - a. A member suggested that the predominance of librarian responses could drive WorldCat changes that are not necessarily appropriate for end-users. It might be better to pursue random surveys of more specific targets, such as separate surveys of end-users, reference librarians, ILL librarians, etc. For example, the fact that 50% of responses were from librarians does not mean that 50% of the users are librarians, because librarians are more likely than end-users to respond to a FirstSearch survey.
6. Geographical breakdown of responses
 - a. Lori will provide this to the group

Building an Online Community to Support Public Access Computing. Jeff Stauffer, Product Manager, Gates Portal

Jeff provided an overview of plans for the Gates public access portal project, which is intended to be a resource for libraries and other organizations that provide open access to information. The portal will help libraries maintain their use of Gates computers by providing technical assistance, access to technical training, links to experts in technology issues and more. The portal is not intended as a hands-on computer support tool, and is not being designed for use by the public. OCLC, the Gates Foundation and several partner organizations will launch the new portal at Legislative Day in Washington, DC on May 12, 2003.

Jeff asked for Interest Group response on topics such as their level of interest in the portal, information about how libraries help people manage technology, staff training on technology topics and challenges in supporting a global population of users.

Discussion included:

1. Academic libraries generally receive this type of technical support through internal systems departments.
2. Maintaining staff expertise in technology areas is a huge issue for public libraries. Many public libraries do not have Information Technology departments to support this need, and rely on interested staff who often "self-train" to stay up-to-date on appropriate topics.
 - a. A member noted that Europe has the "European Computing Driving License", valid across Europe, that certifies the basic skills of computer users.
3. Public librarians need help in making their users more competent in working with technology. Librarians are often called upon to assist library users in their use of computers. To meet this need, almost all staff must maintain above a minimal level of technology knowledge.
4. A web digest of new additions to the site, compiled on a weekly or bi-weekly basis would be extremely useful in helping librarians determine what has been added since their last visit to the portal. This could be in the form of a "What's New" section.

5. The Gates portal will be available for *all* organizations that support public access computing. It will not be restricted to only libraries with Gates computers.
2. List **3-4 significant issues** that the group wants to communicate to Members Council and OCLC.
 1. OCLC should carefully consider the issues related to delivering a public view of WorldCat. The group supports OCLC's goal of increasing library visibility on the Web, but wants to make sure that
 - a. OCLC consider carefully whether or not libraries will purchase this type of service in a period of severe budget cuts
 - b. The public view of WorldCat does not decrease purchases of normal access to WorldCat
 - c. If implemented, OCLC consider a way for libraries that do not maintain WorldCat access via normal channels to purchase access for this service.
 2. Consider OCLC member libraries as a source of information about implementing pop-up surveys.
 3. When surveying FirstSearch users, remember that librarians are more likely to respond to this type of survey than non-librarians. Keep this in mind when deciding about future changes to the service.
 4. The Interest Group endorsed OCLC's offering of QuestionPoint and other services to library education schools at little or no charge, to help them prepare the next generation of librarians.
3. Remembering that OCLC's role is to be the leading global library cooperative, which of the issues in #2 are most urgent and why?

The first issue, implementation of a public view of WorldCat, is the most important of the issues listed. Members support OCLC's interest in helping libraries increase their Web visibility. They were not completely comfortable with all aspects of the concept that were discussed at the meeting. Reasons for this discomfort include:

- Concern that libraries will not purchase this add-on in the current economic environment.
- Fear that some libraries will stop purchasing access to WorldCat on FirstSearch if a public view is available, even if the public view contains less detail than the FirstSearch version.

They will welcome regular updates as market research is completed and the business plan is completed and presented for approval.

4. Please indicate if the group feels that an issue or presentation should be presented to the full Council.

The group learned at this meeting that a presentation on the WorldCat library access cooperative concept is planned for the May 2003 meeting. They want the entire membership of Members Council to hear this presentation.