Setting the Standards for Virtual Reference

R. David Lankes

http://www.askeric.org/~rdlankes

R. David Lankes, Ph.D.
Virtual Reference Desk

www.askeric.org/~rdlankes
How Canada can use Digital Reference Standards to Rule the World!
• The outcome of a political/social process to agree on aspects of a process or product a priori. The aim of a standard is to promote interoperability and the efficient functioning of a market or community.
The Roles of Standards
- Affecting our Worldview
- Interoperability/Communication

Types of Standards
- Technical
- Behavioral

A Unified Framework for Digital Reference Standards

Gaps and Future Work
• RUSA’s Guidelines for Behavioral Performance of Reference and Information Services Professionals

- 1.1 Is poised and ready to engage approaching patrons and is not engrossed in reading, filing, chatting with colleagues, or other activities that detract from availability to the patron.
- 1.2 Establishes initial eye contact with the patron.
- 1.3 Acknowledges the presence of the patron through smiling and/or open body language.
- 1.4 Acknowledges the patron through the use of a friendly greeting to initiate conversation and/or by standing up, moving forward, or moving closer to the patron.
- 1.5 Acknowledges others waiting for service.
- 1.6 Remains visible to patrons as much as possible.
- 1.7 Roves through the reference area offering assistance whenever possible.

Examples
• Make Communications Predictable
  - Dublin Core
• Allow for Automation and Aggregation
  - Z39.50, MARC
• Allow for Heterogeneity in a Common Network
  - TCP/IP, HTTP
Utilization
- standards that deal with the use and delivery of digital reference services, specifically to determine whether a digital reference service is succeeding. These can include a mix of qualitative and quantitative metrics as well as more abstract statements on best practice or objectives for a service.

Technical
- hard tools (software, hardware, protocols and other standards enforced by computers with little or no interpretive room) and soft tools (primarily metadata and organizational schema) where aspects of human description are controlled, but still open to interpretation.

http://quartz.syr.edu
Why Link Utilization and Technical Standards?
- More Holistic View of Process
- Better data gathering for Assessment (and Costing)
  - Vendors Delivering Solutions that help not only interoperability, but also reporting and statistics

Bottom line: The more work the standard/software can do, the less you have to!

For More Detail see Lankes, McClure, Gross, Library Trends [Forthcoming]
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<tr>
<th>Utilization</th>
<th>Quality</th>
<th>Technical</th>
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<tbody>
<tr>
<td></td>
<td>Courtesy</td>
<td>Question Interchange</td>
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<td></td>
<td>Accuracy</td>
<td>Profile</td>
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<td>Repeat Users</td>
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• Courtesy: The behavior of the library or institution’s staff

• Accuracy: The “correctness” of answers provided by a digital reference staff

• Satisfaction: Users determination of their success in interacting with the digital reference service

• Repeat Users: The percentage of users that re-use a service after first encounters

• Awareness: The population user group’s knowledge that the service exists

• Cost: The cost per digital reference
<table>
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<tr>
<td>Number of digital reference questions received</td>
<td>Number of digital reference questions</td>
<td>Acceptability of service</td>
<td>Cost of digital reference service</td>
<td>Amount of staff using over reference technology</td>
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<tr>
<td>Number of digital reference questions answered</td>
<td>Usage of digital reference service by day of week</td>
<td>Expectations for service</td>
<td>% of digital reference service as a percent of total reference budget</td>
<td>Amount of staff using over reference technology with technology</td>
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<td>Total reference activity</td>
<td>User's platform</td>
<td>User's experience</td>
<td>Cost of digital reference service as a percent of total library organizational budget</td>
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<tr>
<td>Percentage of digital reference questions in total reference questions</td>
<td>Sites used for reference</td>
<td>User's satisfaction</td>
<td>Additional measures used to be used with library</td>
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<td>Digital reference current request fill rate</td>
<td>Digital reference completion rate</td>
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<tr>
<td>Number of unsolicited digital reference questions</td>
<td>Type of digital reference questions received</td>
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<tr>
<td>Total number of referrals</td>
<td>Satisfaction with service</td>
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Performance Measures
- Question Interchange Profile (QuIP)
- NISO Standards Committee AZ
  - Metadata
  - Profile
  - Protocol
- Utilization
  - Which are Core?
- Technical
  - Real Time Interconnection
  - Profile Modules
- Grounding Practice in Research
  - “First Mature Digital Library Application”
  - Reverse of Digital Library Development
- National Library of Canada
- Information Institute of Syracuse
- Harvard
- National Science Foundation
- U.S. Department of Education
Digital Reference is a Field in Flux

There are few Large Scale Projects... Even Fewer Built on Open Standards:

- CDRS/QuestionPoint
  - Large Number of Participants, Closed System
- Virtual Reference Desk
  - Active in Standards Development, but still Dependent on E-Mail
• Virtual Reference Canada has an Amazing Opportunity:
  - Become an International Model in Digital Reference Networks
  - Influence/Set Standards
  - Teach Others how to Build Networks in an Open Way
    • Closed Systems Maximize Market Value, Open Systems Maximize Influence
• Get Involved
• Build in Public
  – Open Systems, Open Source, Open Standards
• Tell Your Story
  – ALA, CLA, VRD