



Sett
the
Stan
for
Virtu
Refere

How
Can
can
use
Digit
Refere
Stan
to
Rule
the
World

Wha
are
Stan

Age

Setting the Standards for Virtual

Setting the Standards for *Reference*

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

What are Standards



- 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

Agenda



Sett
the
Stan
for
Virtu
Refere

How
Cana
can
use
Digit
Refere
Stan
to
Rule
the
World

Wha
are
Stan

Age



The Roles of Standards



Settling
the
Standards
for
Virtual
Reference

How
Can
we
use
Digital
Reference
Standards
to
Rule
the
World

What
are
Standards

Agenda



Standards Affect our Worldview

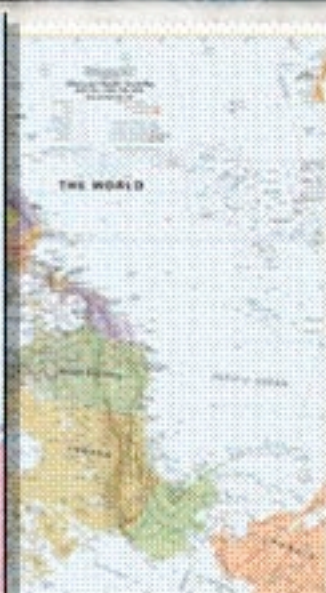


Setting the Standards for Virtual Reference

How Can we use Digital Reference Standards to Rule the World?

What are Standards?

Age



Standards Affect our Worldview



• 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 Moves 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

Interoperability

- Utilization

- standards that deal with the use and delivery of digital reference services, specifically to determine whether a digital reference services 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>

Digital Reference Standards

- 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]

A Unified Standards Framework

- 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]

A Unified Standards Framework



Utilization	Quality	Courtesy
		Accuracy
		Satisfaction
		Repeat Users
		Awareness
		Cost
	Performance Measures	Descriptive
		Log
		User
		Cost
Technical	Question Interchange Profile Knowledgebase	Staff
		For more details see NISO AZ

Unified Dig_Ref Framework



- **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

Quality Standards

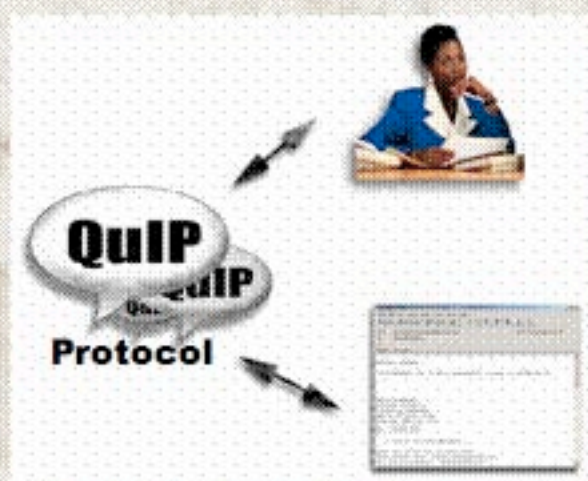


Descriptive	Log	User	Cost	Staff
Number of digital reference questions received	Number of digital reference sessions	Awareness of service	Cost of digital reference service	Percent of staff time spent researching technology
Number of digital reference responses	Usage of digital reference service by days of the week	Accessibility of service	Cost of digital reference service as a percent of total reference budget	Percent of staff time spent advising users with technology
Number of digital reference answers	Usage of digital reference service by time of day	Expectations for service	Cost of digital reference service as a percent of total library organizational budget	
Total reference activity	User's awareness	Other services were used		
Percentage of digital reference questions to total reference questions	User's platform	Monitors for use		
Digital reference current answer fill rate		Monitors for use now		
Digital reference completion rate		Satisfaction with staff		
Number of unanswered digital reference questions		Library-wide satisfaction		
Type of digital reference questions received		Impact of service on user		
Total number of referrals		Additional services that need to be offered		
Satisfaction rate		User demographic data		
Answers used per question				
Percent of questions with				

Performance Measures



- Question Interchange Profile (QuIP)
- NISO Standards Committee AZ
 - Metadata
 - Profile
 - Protocol



Technical Digital Reference Standards

**Technical Standards****Utilization Standards**

The Dangers of Early Standards

- Utilization
 - Which are Core?
- Technical
 - Real Time Interconnection
 - Profile Modules
- Grounding Practice in Research
 - "First Mature Digital Library Application"
 - Reverse of Digital Library Development

Gaps and Future Work



- National Library of Canada
- Information Institute of Syracuse
- Harvard
- National Science Foundation
- U.S. Department of Education



Digital Reference Research Symposium



- 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

<Soapbox>



- 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

</Soapbox>



- Get Involved
- Build in Public
 - Open Systems, Open Source, Open Standards
- Tell Your Story
 - ALA, CLA, VRD

The Reference Revolution