

RUSA/MARS Virtual Reference Discussion Group

June 28, 2015

San Francisco, CA

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Approximately twenty people attended some portion of the discussion. The goal of the discussion was to better understand the software available for virtual reference and to share experiences with those tools. We want to know more about our technological options for virtual reference services, especially as technologies seem to disappear or merge with other (sometimes more expensive) tools.

For leads on what products or technologies are available we referred attendees to the Virtual Reference Companion, an online tool created and maintained by the MARS/RSS Virtual Reference Tutorial Subcommittee, specifically the section labeled *Technologies Toolbox* (<http://www.ala.org/rusa/vrc/tech/toolbox>).

To begin the discussion, we asked attendees what tools they were currently using for virtual reference. Those tools mentioned were:

- OCLC [QuestionPoint](#) (email and IM)
- [LibraryH3lp](#), with Twilio add-on (IM and texting)
- SpringShare [LibAnswers/LibChat](#) (FAQ and email, IM)
- [Live Person](#) (IM)
- Microsoft [OutLook](#) (email)

One institution gave up on [Mosio's Text a Librarian](#) (texting) because the process to answer a patron required too many steps. No one uses [Google Hangouts](#) for their virtual reference service.

We then asked attendees to share what they liked about the tools they were currently using. For most attendees, the features that allowed one to be alerted or to answer within an existing system (e.g. personal email) or that allowed one to not receive patron inquiries in personal email, were most often mentioned. For example, some people liked QuestionPoint notifications that arrive in personal email, which served to alert them when an email question needed handling within the QuestionPoint system. One person mentioned that LibAnswers, as a contained system, kept emails etc. out of her personal email, and that this feature was desirable. Also mentioned, as a QuestionPoint feature, was the option to transfer tickets from one person to another, as email messages. People liked the ability to receive survey-based feedback within QuestionPoint. One institution uses [FootPrints](#), an IT help desk system that allows management of a single email queue accessible to staff, automatic assignments to teams or individuals, and management tools, like reports.

Attendees expressed a need for co-browsing (i.e. not just the ability to push pages to a patron, but actual collaboration capability on a shared web page). Some people mentioned that those institutions that participate in consortial service arrangements need to update their policy information, to provide better service to patrons.

We asked what emerging technologies might be on the horizon for use in virtual reference services. Attendees mentioned that video conferencing was on the immediate edge of their sights. Facetime is available in the IOS world. Could video phones be far behind (in terms of emerging devices)? Google Hangouts requires a gmail account, but perhaps Skype use will increase now that Microsoft owns this product. Twitter use might increase, as this tool has become mainstream in other areas of life. We noted that SpringShare included a Twitter channel as part of LibAnswers. For screen casting, people are using [Jing](#) to supplement the text-based answers they provide.

We then briefly discussed “proactive chat” in that some systems give us an opportunity to provide pop-up dialog boxes (e.g. LibAnswers). Some vendors also provide embedded widget options within databases, allowing us to provide help more closely to where the user might be experiencing issues. One institution mentioned a significant increase in questions when they launched a pro-active chat tool. A few people expressed a concern about the quality of questions that would come to their virtual reference services if they provided a pop-up dialog box wherever the patron paused on their library web site.

The group was asked about potential future discussion topics:

- Update or summary about a QuestionPoint research project one institution is engaged in
- Library staffing and service marketing – how can we market the services if we don’t have the staff to support the increased demand?
- Who should be answering virtual reference questions – librarians, staff, students?
- How is virtual reference different from face-to-face reference? E.g. what is the balance between purist instruction and getting users to the information they need in order to finish their work?
- Issues and best practices around proactive chat

Respectfully submitted,

Karen Reiman-Sendi