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ABSTRACT

Digital reference services at university libraries in Australia and New Zealand are a recent phenomena dating back to the late 1990s--following the developments in Web-based online library services. This paper examines the move towards the provision of e-mail reference services based on the study of 16 randomly chosen university libraries in Australia and 4 in New Zealand. The Web sites of these 20 university libraries were analyzed. This paper presents findings for each of the following questions posed by the study: (1) How accessible is the e-mail reference service on the library's homepage? (2) Are the parameters of the e-mail reference service fully explained in terms of types of questions handled and the maximum response time? (3) Are the guidelines of privacy or confidentiality spelled out? (4) Is there a feedback facility evaluating or commenting on this service's effectiveness? (5) Who can access the e-mail reference service? For example, is the service extended to users in the community? (6) What information is required from users of this service? (7) How useful is the design of the e-mail reference form for conducting a successful reference answering service? Further steps are also discussed. (Contains 26 references.) (AEF)

Virtual Reference Services – Down-under: A Cautionary Tale

G.S. Wagner

“Revised Version – September 18, 2001”

Gülten S. Wagner

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Abstract

Digital reference services at university libraries in Australian and New Zealand is a recent phenomenon dating back to the late 1990s – following the developments in web-based online library services. At the Victorian Association for Library Automation’s (VALA) 1996 biannual national conference titled “Electronic dream? virtual nightmare, the reality for libraries” Edward Lim pointed out the absence of full-fledged virtual library services for remote students as one of the fatal flaws of most current models of the online or virtual university [in Australia]” (1996). In 2001, after a short span of five years, almost all university libraries in Australia and New Zealand are offering e-mail reference services in addition to a range of online services and products from document delivery to subject guides to digital resources and to online tutorials.

Introduction

This paper examines the move towards the provision of e-mail reference services based on the study of 16 randomly chosen university libraries in Australia and 4 in New Zealand (see References section Part 2 for their URLs). There are 40 universities in Australia. However the number of university libraries is much greater – as the majority these universities serve campuses with branch libraries, in metropolitan areas as well as in country towns. New Zealand has 8 universities, some with branch libraries. Libraries chosen for this study include most of the major universities, including major research universities, in Australia and New Zealand. All of these are

federally funded and controlled universities. There are very few private universities in Australia and New Zealand.

Since the late 1990s, these libraries began offering human-mediated virtual reference services mainly by means of e-mail reference request forms. The web sites of these 20 university libraries were analysed to understand the state-of-art of e-mail reference services today – late 2001. The study posed the following question:

1. How accessible is the e-mail reference service on the library's homepage?
2. Are the parameters of the e-mail reference services fully explained in terms of types of questions handled and the maximum response time?
3. Are the guidelines of privacy or confidentiality spelled out?
4. Is there a feedback facility evaluating or commenting on this service's effectiveness?
5. Who can access the e-mail reference service? For example, is the service extended to users in the community?
6. What information is required from users of this service?
7. How useful is the design of the e-mail reference form for conducting a successful reference answering service?

1.How Accessible is the e-mail reference service on the university library's homepage?

Accessibility of the virtual reference service – especially its e-mail reference service is as important as its physical counterpart – if not more so in a virtual library environment. The majority of the libraries (18 out of 20) provide web based e-mail reference query forms. Yet only in 9 cases are they placed in a prominent location – on the library's gateway page. These include: University of Queensland Library's 'Ask a Cybrarian', RMIT's 'ask e-QUERY', 'Ask a

Librarian' at University of Sydney Library, and 'Ask a Question' at University of Technology, Sydney's Library.

The name of a rose! E-mail reference services are perhaps less clear when they are called: 'Need Some Help? Contact Us' (Edith Cowan University[ECU]) or 'InfoHelp' (James Cook University). However, a more serious problem occurs when the link to the e-mail reference service is pushed to the second or the third layer of a library's main web gateway. For example, 'Help/Feedback' button provided on the main page connects to 'Ask us a question' on the second layer (Adelaide University), and at Melbourne University it is referred from 'Services' on a second screen, to the e-mail reference form on the third screen. Thus, two main problems emerge: e-mail reference services are not always easily accessible and the naming of this service by a plethora of labels is confusing.

2. Are the parameters of the e-mail reference services fully explained in terms of the range of questions covered and the maximum response time?

Surprisingly, only 7 do a good job explaining the extent of these human-mediated virtual reference services. RMIT University Library's e-mail reference service provides a fairly clear outline as listed below:

- advice about search strategies and appropriate resources,
- advice about accessing and using the Library's electronic resources,
- assistance with the catalogue,
- brief factual information from the Library's reference collection,
- verification of references, and
- information about library's services and facilities.

(www.lib.rmit.edu.au/equery/index.html, September, 2001)

University of Newcastle Library informs users that e-mail reference service is “designed to answer brief factual questions only. For more complex questions please come to the Library Desk, or make an appointment with a *Faculty Librarian* [a clickable button]”.

An immediate response to the e-mail query is an essential aspect of the electronic reference service. Just over one third of the libraries (7) announced a turnaround time of one working day or 24 hours whereas 4 announced their response time as 48 hours (or two working days). Only one library's response time is given as long as two weeks. No specific timeframe is provided by the rest. Comments such as “Please supply as much information as possible to assist us to reply to you promptly” (Curtin) signals an open-ended and less definite approach to the respond time. Although the Macquarie University Library also does not commit itself to a definite timeframe, perhaps the availability of a trial Virtual Conferencing facility with reference librarians (from 1.00pm to 5.00pm Monday – Friday) provides a fallback system. However, in most cases applicants are invited to contact the Information Desk if the information request is urgent.

Turnaround response time is the key issue in the provision of e-mail reference service. A cautious observation comes from Edith Cowan University where e-mail reference service was introduced only last year (October/November 2000). “Whilst few E-Reference queries require detailed responses it should not be overlooked that a significant number of clients require a great deal of support. This is particularly true for Reference and Website queries. This can mean that staff could enter into an E-mail rally (one example being of six E-mails to one client) and sometimes requiring telephone/fax communication as well”(ECU Library E-Reference Report, 2001).

During a 5 month period, from January to June 2001, Edith Cowan University's e-mail reference service received 180 queries in 7 categories:

- verification of references
- referencing queries
- directional [referring people to other resources – such as to the Virtual Reference Gateway where digital reference sources are kept]
- information about Library services – such as document delivery
- Library catalogue queries
- loans/ borrowing queries
- Endnote queries – [how to use it, etc.]

(ECU Library E-Reference Report, 2001)

It should be pointed out that ECU's 'Need Some Help? ...Contact Us' hub provides 3 contact points: (1) questions on borrowing items, (2) questions about finding information – e-Reference Librarian, and (3) for queries regarding the web systems, database access, etc., thus controlling misdirected queries. E-mail query traffic is heavier in libraries where such services have been in place for a longer period. For example, at Monash University 'e-Query' information desk, which offers a 24 hour turnaround service, from 200 to 450 queries are received every month. Approximately 70 percent of them are answered directly, the rest are directed to specialists (Roberts, 2000).

It is reported that the introduction of e-mail reference services lead to a reduction in desk reference services (e.g., Wilson, 2000). In Australia, Queensland University Library reported the same outcome: "reference staff have experienced a reduction in non-electronic queries" (Roberts, 2000: 204). It can be deduced that with the passage of time a similar outcome may occur at Edith Cowan – balancing the loads placed on traditional and electronic reference services.

Another time saving strategy is to encourage users to consult FAQs before submitting their e-mail queries. Almost all of the libraries in the study provide FAQs on their library web gateways – only in some cases do they appear as links on the screen containing the e-mail reference form. Curtin University of Technology Library modifies FAQs in such a way to help to reduce the load on the e-mail reference queries (Long, 2000) yet none of them promote the use of FAQs on their e-mail forms as clearly as Rutgers University Libraries' form does: "BUT FIRST ... Before asking your question, please check to see if it's already dealt with in the Frequently-Asked-Questions [clickable button] list. You could save yourself, and us, a lot of time!" (Rutgers University Libraries, 2001).

At the Macquarie University, the only library in the study which offers a trial 'Virtual Conferencing' facility in addition to their e-mail reference services, a round the clock 24/7 global e-mail reference service is secured in partnership with the University of Newcastle Library and a library in the USA. Queries are sent to whichever library is on duty. The answer comes back to the client through the Macquarie server, while "the client is quite unaware that the answer to their question may have come from the U.S.A. The library uses Clientele reference tracking software. A co-ordinator monitors the questions and assigns them to various staff members"(Roberts, 2000:204).

3. Are the guidelines for confidentiality provided?

It is a surprising outcome of this study that none of e-mail reference forms provided by university libraries contain any statements regarding privacy or confidentiality.

4. Who can use the e-mail reference services provided by the university libraries in Australia and New Zealand?

Obviously, the main target audience of these institutions are their students and staff (including the faculty) as openly stated on their web sites: "This service is for the students and staff of the University of Queensland and staff of teaching hospital". Some libraries even require student/staff ID (identification) numbers on the e-mail reference forms. Whereas, some university libraries offer access to the outside community as judged by the presence of 'other' category in the drop lists of user categories, e.g., Curtin University of Technology. Some others add a qualifying statement for this provision: "Our time available to answer queries from other people is limited"(University of Canberra), "Enquiries from outside the RMIT community will be handled if they relate to the library's collection or services" (RMIT University) and "This service is provided mainly for staff and students of the UTS ...[we] cannot guarantee a response to non-UTS clients"(University of Technology, Sydney).

5. Is a feedback facility provided?

It is important to collect feedback from the users of e-mail reference services. Few e-mail reference forms in the study contain a feedback box. However, almost in all cases a general suggestions box is provided somewhere in the library's web pages. Curtin uses the e-mail reference form for queries as well as for obtaining comments.

6. What information is required from the enquirer?

Almost all of the libraries in the study require contact details from the users: full name, e-mail address, library ID or barcode number, status within the university (such as -

staff/postgraduate/undergraduate student, etc.), postal address, telephone/facsimile numbers, department/school, etc., and selection of a subject library (in some cases). Perhaps this much information creates an overload – and it can be off-putting to supply long library ID numbers, especially during more stressful times, such as examination periods. (It should be pointed out that in Australian and New Zealand university libraries ID numbers are not linked to a Social Security type of code).

7. How useful is the design of the e-mail reference form?

The sole object of the e-mail reference service is to establish accurately, precisely and economically what information is needed by the user. Thus, the design of this form is the crux of the e-mail reference process. The section below presents the most commonly found features of e-mail reference forms:

- Statement of the query

E-reference forms try to secure as much detail as possible about the query as the following indicates:

“Please describe your question, providing as much information as possible. The more specific your query, the better chance we will have of providing a useful answer”

(RMIT), “As much detail as you can” (Edith Cowan), “My question is about ...Choose a topic area” (Queensland), “What would you like to know? Please provide as much detail, such as dates, geographic area, company names, etc. Complete sentences will help us to answer your questions. Keywords - Provide any keywords, significant terms, phrases, synonyms, acronyms, etc., that describe your subject” (Auckland).

- Background information

Users are prompted to provide extra information about the history of their search on the query topic: “Tell us your question and, if applicable, list any sources you have already

consulted to find an answer” (University of Western Australia), “Tell us about your ideas on how to find this information. (So we don’t look in places you have looked already)” (Canterbury).

- How the information will be used?

Purpose of the query is requested in some cases: “Sometimes we can use our subject knowledge and experience to think of other places to look for answers and information if we know how you will use it or what you want to get out of the answer. For example are you writing an essay?”(Canterbury), “What do you want this information for? (This will help us where to look)” (Auckland). Another useful feature is the “Latest date that information will be useful” as requested by universities of Canberra and Western Australia.

Findings

Web-based e-mail reference service in Australian and New Zealand university libraries is a fairly recent development. This study of 16 Australian and 4 New Zealand university libraries provides a snapshot of what they are offering today. At this stage, it merely provides a signpost for measuring future developments. Findings of the study are summarised below:

1. E-mail reference services are not always well promoted – only about half of them are placed on the library’s gateway page.
2. Almost all use web-based e-mail reference query forms.
3. No standard naming practice exists.
4. Accessibility to these services by and large is limited to the affiliates of the institutions they serve – although some offer qualified access to the users in the community.
5. E-query forms vary in the amount of information they require from the users about –
 - a. their affiliation with the university and contact information,

- b. the nature of the query,
 - c. purpose of the query, and
 - d. the research already taken place on the topic of the query.
6. Privacy and confidentiality issues are not covered in any of the cases.
 7. Library's general 'Suggestions' box is the sole feedback mechanism in most cases.
 8. Co-operation amongst libraries for e-query answering purposes occurs only in one case.
 9. Only one library is offering a 'Virtual Conferencing' facility on a trial basis.

What Is Next?

This is only the dawn of virtual reference library services in university libraries down-under. This landscape is bound to change just as dramatically in the near future as it has since 1996. It can be predicted that the next 5 years will bring rapid developments to virtual reference services with the availability of complex query answering services, interactive work spaces; web video conferencing, and chat facilities.

Developments need to occur on three fronts to help to implement full blown virtual reference services in Australia and New Zealand.

1. Continuous analyses of users' information seeking behaviour in web environment. Reference librarians need to have a better understanding of the information seeking behaviour of users in order to design better query answering systems.
2. Management of virtual reference services need to provide the vision and leadership to:

- a. create knowledge management systems which are capable of handling some ready reference e-query answering processes,
 - b. design meta-data knowledge management systems supporting more complex e-query answering tasks,
 - c. develop expert systems to assist with the handling of simpler queries,
 - d. develop networks of human expertise for query answering,
 - e. adapt technologies to facilitate e-mail analysis and routing tasks, and
 - f. conduct skills-base analyses and training for reference librarians for their changing roles.
3. Closer co-operative ventures amongst university libraries (nationally and internationally) to share the burden and to eliminate unnecessary duplication of labour and costs.

The guiding compass of this move to the future remains in the first item: a better understanding of users' information needs.

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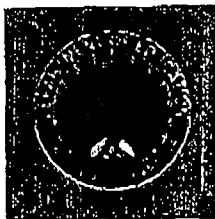
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