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## Statewide Virtual Reference: a Second Call to Action

Ruth Vondracek  
*Oregon State University*

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# Statewide Virtual Reference:

## a Second Call to Action

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by Ruth Vondracek

Head  
Reference and Instruction  
Oregon State University

Chair  
Statewide Virtual Reference  
Advisory Board

### *E-Reference Services*

- *Create a collaborative on-line reference service that is available 24 hours a day, 7 days a week.*

**V**ision 2010 calls for the creation “of a collaborative online reference service that is available 24 hours a day, 7 days a week.” The statewide virtual reference pilot project answers that call. Implemented in April 2003 by participating Oregon public, school and academic libraries, the service provides collaborative online reference service to anyone in the state. Although chat service is not yet available 24/7, users can ask questions by e-mail at any time, with a guaranteed response time of two days. Realistically, providing round-the-clock service may take longer to achieve because of staffing challenges; it would require either partners in a different time zone, contracting with reference service providers, or finding several night-owl librarians who are ready to pitch in during the wee hours. One question to explore will be whether 24-hour coverage is necessary or desirable.

Statewide reference service offers many benefits and opportunities to library patrons and libraries alike. For example, any Oregon library can now refer their patrons to the free online service and be assured that the patrons will find the help they need. This is a boon for libraries without adequate reference staff. In addition libraries that are providing service do not have to pay for the price of the software; LSTA grant funding currently covers those costs. For patrons, it means being able to get answers to their questions while they are online no matter where they are located.

The project presents a major opportunity for Oregon librarians to develop a regional knowledge base of reference specialists and collection strengths. A

knowledge base of this type will facilitate reference referrals and complement the global referral service available through QuestionPoint, that some libraries are considering for use.

At Oregon State University (OSU) we envision virtual reference becoming a primary means of communication with our students and faculty for teaching and research. The capability of co-browsing coupled with the immediacy of chat and eventually Voice over IP (VoIP) enhances our ability to reach students at the time they need assistance, whether they are in dormitories, classrooms, or 200 miles away. We could set up appointments with students or faculty to meet online, consult one-on-one, set up sessions with an entire class and link the service to online classes delivered through Blackboard Learning System software. Librarians could also set up online office hours for specific classes.

Our conversations about how to use virtual reference at the OSU libraries invariably draw us into discussion of several issues about the service. For example, how we can use this service to support the special needs of our individual library community? How can we ensure that users are referred to us when it is appropriate? How do we mesh the academic library instructional approach to the public library approach of giving answers? How do we staff a virtual reference service along with our reference desk service, e-mail and phone services, particularly when we are short staffed? Does it make sense for us to answer general reference questions when we don't have the specialized resources to answer them?

These questions are not unique to OSU. Other academic and public librarians raise similar questions. For example, we have few resources at OSU that help us answer questions about the value of collectibles and antiques, and many of us lack the knowledge of the appropriate resources. Similarly, many public librarians




would struggle with answering in-depth college level science questions.

The answer to some of these questions is rooted in traditional reference service methods, referring a patron to the best resource or person to answer their question. The immediacy of chat reference tricks us into believing that we have to answer even in-depth questions in seconds. I advocate that we should stay true to our principles of getting our patrons to the best information possible. This involves referring them to the most appropriate person to answer their question, even if it takes longer. Setting up an effective question referral network will facilitate this service. The RefTracker software, which refers questions via e-mail, is designed to route questions appropriately. To ensure the effective use of this software will require setting up a knowledge base of the subject specialties of Oregon librarians and libraries' collections strengths.

So far the virtual reference pilot project has focused on operational issues, such as working out kinks in the software (Tutor.com's Virtual Reference Toolkit, formerly distributed by LSSD), evaluating whether this is the software we want to continue using, creating a viable scheduling process, and training librarians to use the system to answer questions. The Statewide Virtual Reference Advisory Board appointed task forces to review and present information on such issues as use and service policies, quality standards, and assessment.

Before we transition from pilot project to full-fledged service several things must be accomplished. The project team limited the number of participants during the pilot to simplify the initial implementation. It is now time to open up participation to other libraries and build capacity for the librarians delivering the service. Once we begin to promote the system more widely, we anticipate an increase in the volume of questions, which will require staffing more librarians during each shift. The quality

standards, service policies, and assessment methods need to be developed further, agreed upon by the participating libraries, and then applied. In addition, the knowledge base of frequently asked questions and referral information needs to be built. All of these activities will require additional training and discussion. A future goal for the project includes looking for regional libraries with which to partner in order to expand the service including, for example, the Orbis Cascade Alliance as well as partnering with libraries in another time zone to broaden coverage.

It has taken the combined efforts of many libraries and our software vendors to get us where we are today with collaborative reference services. To continue to build a quality statewide reference service, we need your continued involvement. Consider this a follow-up "call to action." 

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