VET:
The Virtual Evaluation Toolkit

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This manual is the result of work by the Needs Assessment Subcommittee of the Statewide Virtual Reference Project, with assistance from many librarians associated with the Project, especially our "Anytime, Anywhere Answers" trainers. Materials and procedures were developed and tested between October 2003 and July 2004.

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INTRODUCTION

There are many ways to evaluate library reference services, but in the rush to "just do it," few have been applied to virtual reference service (VR). The purpose of this manual is to provide libraries with *practical* tools and methods for evaluation, recommendations for implementation, and examples of ways that libraries have improved services through analysis of these and similar instruments. Although the Toolkit examines a variety of service perspectives and issues, it is far from a comprehensive document. Every library must determine its service objectives and priorities, then select the most appropriate and feasible approach to evaluating VR. The bibliography offers resources for additional and more complex assessment options.

Some of the VET checklists and methodologies are based on activities developed for the "Anytime, Anywhere Answers" training curriculum.[1] The extraordinary success of that program, with the significant insights into and suggestions for improvement of customer service made by participants, underscores the value of a user-based approach. VET tools assess virtual reference from customer, service provider, and administrative viewpoints. Even more than evaluation, this process leads to the identification of best practices for virtual reference service.

Although email is an important part of digital reference, it should be noted that VET concentrates on service delivered via chat, since that is the primary focus of the Statewide Virtual Reference Project, an LSTA-funded initiative that ends in September 2005.

How to Use VET

The Virtual Evaluation Toolkit is organized into three levels of implementation from which libraries can choose a variety of tools. Each level builds on the previous one, on the assumption that each requires added resources—staff, time, expertise, funds, and/or specialized software applications. Administrators, managers, and staff members who will plan and implement the evaluation should review this manual and choose the level and tools that best meet local needs by measuring priority service goals. Libraries that begin their evaluation plan by identifying desired outcomes for VR can use the tools to assess the extent to which it achieves the intended results. Ideally, data is collected from some form of evaluation tool as soon as the service is initiated—a pop-up customer satisfaction survey, web server log statistics, vendor-supplied reports, etc. This will provide a baseline against which future activities can be measured.

One cautionary bit of advice: don't be over-ambitious. You can eat the elephant one bite at a time, so focus on one or two aspects of the service, such as usage, staff effectiveness, or customer satisfaction. Then select the tools that will provide information related to those concerns. Reading the examples of the ways that these or similar activities have been used by libraries to improve or modify VR may help determine which are most appropriate for your library.

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[1] This curriculum was developed in 2002 by Mary Bucher Ross and Daria Cal, Seattle Public Library; assisted by Emily Keller, a student at the University of Washington Information School.

The most objective results will be obtained when the library retains the services of evaluators from outside the local institution. This is especially true for the Virtual Reference Transaction, Web Site Evaluation, and Virtual Reference Policy checklists.

Many of these tools can be adapted for use in evaluating services in a collaborative environment. We would welcome reports of such use for inclusion in future revisions of this document.

One final note: because virtual reference is a relatively new service, some libraries have switched from one vendor’s software to another after an initial subscription period. The evaluation tools provided in this manual are intended for use with a service that has been stable during the period covered by the evaluation. Using the tools to compare a period of time using one application with a period of time using a different one is akin to the old “apples and oranges” analogy. It will be very difficult to determine the effect of software-related issues on customer service.

PRE-EVALUATION PREPARATION

Assemble a Team

The evaluation process requires one or more staff members who will:

- Develop the evaluation plan / select tools to be used
- Collect and compile data (new or existing)
- Implement evaluation tools
- Analyze the results
- Communicate progress
- Write and distribute a final report
- Recommend improvements based on the report

There are a number of skill sets needed to complete these tasks. Planning requires both an understanding of evaluation methods and an overview of service components, such as: quality control for customer service, the effectiveness and efficiency of procedures, economic concerns, marketing, appropriate use of resources. Data collection needs attention to detail and timeliness. Analytical skills are critical to the process of correlating and breakdown of results. Those who communicate progress and write reports must be articulate both orally and in writing, be sensitive to deadlines, and understand distribution methods. All of the work requires the support of administration and the trust of subordinates (see Staff Buy-in, below). Communication efforts throughout should follow the old public relations rule: "Tell them what you're going to do, tell them what you're doing, tell them what you did."

If any of these areas of expertise are not available among library staff members, then consideration should be given to using outside evaluators or consultants. Such persons may be paid or recruited from colleagues in partner/consortium libraries in exchange for similar or other duties.

Identify Expectations

Prior to beginning the evaluation, library staff members should list their expectations for the process and results. Examples:

> "The evaluators should be as objective as possible."
> "The process should not interrupt normal library operations."
> "The process should not create extra work for those not involved in the evaluation."
> "The final report must be complete, well-organized, and clear."
> "The final report should offer recommendations for using the results."

When the evaluation is complete, the results should be compared to the preliminary list of expectations. A close match is reason for applause; consequences that diverge from those that were anticipated can help improve or tweak future efforts.

Staff Buy-In

Involve staff and stakeholders, such as Board members, in planning for the evaluation. Be sure that everyone who might be affected by it contributes to the goals of the project and also understands their role in the evaluation process. Consider offering a general information meeting for all staff.

Determine in advance any anticipated barriers that might be encountered during the evaluation process. Examples:

- staff availability
- timing of evaluation activities
- language barriers
- lack of confidence
- authentication requirements

These are all potential obstacles that can be handled proactively to make the process run smoothly. The first four issues all relate to staff comfort with both the overall process and individual contributions. Consult library and individual schedules to confirm that there is sufficient time to complete all activities and that the evaluation doesn’t interfere or conflict significantly with other events.

Many staff members become anxious as soon as the word “evaluation” is mentioned. Good communication is paramount. Provide a complete description of activities and emphasize that they are not being completed in isolation. That is, the purpose is to assess service as a whole, not individuals. Additional information related to staff perceptions is offered in the section on Peer Transcript Review (page 29).

If your library requires authentication (library card number, student number, etc.) when logging on to the service or to use licensed databases, it may be necessary to establish temporary fake accounts or numbers in order to initiate identity-neutral chat sessions for evaluating VR transactions (see Virtual Reference Transaction Checklist, page 13-14). Determine requirements and appropriate measures needed to meet them before beginning the evaluation.

Establish a method for obtaining feedback from them—email, suggestion box, meetings, etc. Whenever possible, assign responsibility for responding to feedback to someone involved in the evaluation process. Compile a list of feedback gathered and notify staff when their ideas have been incorporated. Keep staff apprised of progress at regular intervals, including notification of important benchmarks. For example, an email to all staff might read:

> “We completed Evaluation Phase I on schedule on Friday, May 28 with a higher than anticipated return rate for surveys. In the next step, the Evaluation Committee will compile the results. We anticipate that the final report will be issued by June 15. If you have questions, please contact Lotta Smarts at 123-4567 or email lsmarts@usalib.org”

When the evaluation is completed, the final report should be shared with all staff and their comments solicited. These can be incorporated into considerations for improving virtual reference service, and noteworthy observations communicated to the staff.

TOOLS

Level I

This level provides a set of basic tools, with an emphasis on evaluating customer service. It was used in our 2004 test site evaluations. Note that whenever possible, evaluators should be recruited from outside the department or library being assessed, in order to ensure reasonably objective results.

Web Site Evaluation Checklist

Purpose: to ensure that the Web site works well, meaning that John and Mary Patron, who are average folks in terms of ability and experience, can use it for its intended purpose without getting hopelessly frustrated.

Method: Log on to the library's Web site, then carefully examine all pages for usability. The checklist focuses on a number of facets of Web site design that affect customers' remote interaction with the library—collections, services, and staff. For each of the categories, offer comments that underscore positive characteristics of the site and/or clarify problems. When the checklist is complete, provide an overall review of the Web site, highlighting pages or aspects that are excellent, unusual, or that need improvement.

Note that this activity is related to the Reference Policy Checklist which follows. While exploring the Web site, look for references and/or links to any formal library policies related to the service and bookmark any pages where they are found.

Recommendations: One of the most important considerations for VR is consistency. On a web site, this means that the same term is used for the service wherever mentioned, that page layout is fairly uniform, that navigation tools (e.g., tabs, breadcrumbs, button bars, etc.) are consistent, and that content is well-edited. In the following paragraphs, questions are posed that may help put the evaluation in context.

Branding: A brand includes all of the associations a user makes with a service or product, from name and logo to descriptions. Successful brands evoke a lasting emotional response that underscores the value of the service. A strong brand makes a promise, then delivers. As you explore the Web site, ask these questions: What is the name of the service? What image or logo is used to "brand" the service? How is the service described? Is library jargon used? Do you think the name, image, and description are appealing and attention-getting? Is the link easy to find on the main library Web page? Are there links to the virtual reference service from all areas of the library's Web site? From the catalog? From the online databases? From the circulation information page?

Accessibility: Remember that people won't use a Web site if they can't find their way around it. Good site design offers high visibility and clear, simple, consistent navigation. Questions to ask:

Is the service open to anyone? Is a library card or student ID number required for access? What other restrictions exist? Where are these restrictions stated? When is the real-time reference service open? What are the user's options when the service is closed? Is the service available on holidays? Are disability requirements taken into account?

Scope of Service: Is there a clear statement about the kinds of questions that are appropriate for this real-time reference service? Does it offer more than simple, factual answers? If targeted to college students, is it clear how much research help will be provided? Does the service promote information literacy by offering to demonstrate how to find answers or use the Web more effectively? Are links to starting points for Web searching provided? Links to how to cite Web sources? Who are the staff providing answers through this service? What are their qualifications? Subject expertise? Is there any disclaimer about providing medical or legal advice? Are there any statements about copyright restrictions or about citing online sources?

Confidentiality and Data Gathered: What kind of information is gathered in advance about the user or about the question? Reading level or level of information sought? Homework assignment? Phone number? How is this information used? What is the privacy or confidentiality policy? Where can a user find the privacy policy? Is there an option to remain anonymous? If so, is there an explanation of what that option means?

Examples (Use of Results): Branding -- For nearly two years, the digital reference service at Seattle Public Library provided a little-noticed link at the top of the Web site home page. The link was in plain, small-font type, "Ask a Question." Assessment over time resulted in re-design in March 2004. SPL added a large, square blue button with a centered question mark and bold text "Ask a Question" at the center right of the page. The email traffic doubled, almost overnight—and for email, that was the only change made. (The chat service underwent a number of simultaneous changes, making it impossible to determine the exact effect of the new link.)

WEB SITE EVALUATION CHECKLIST

Evaluator: ____

Library Web Site visited: ____________________________________

Date/Time: ____

BRANDING (includes the name, logo, tagline and descriptions of the service. A brand makes a promise, then consistently delivers)**:**

	Yes	No
Name of service (appealing, memorable, descriptive)		
Tagline (jargon-free, relevant)		
Logo (attractive, visible, appropriate)		
Links to service (easy to locate, on main page)		
Other links to service (from additional Web pages, such as catalog, online databases, and/or circulation page)		
Consistency (page layout, use of graphics, and message are uniform throughout Web site)		
Comments on service branding:		

***ACCESSIBILITY*:**

	Yes	No
Navigability (minimal scrolling and clicks to point of question entry)		
Service availability (clear statements on availability -- to anyone, library card or ID required for access, other)		
Restrictions (clearly stated, visible)		
Service hours (limited, coincide with library open hours, 24/7, holidays)		
Technology requirements (clearly described--browser, plug-in, etc.)		
Disability alternatives (Bobby approved or ADA compliant)		
Comments on Accessibility		

SCOPE OF SERVICE:

	Yes	No
Service description (clear, complete, jargon-free)		
Questions (limitations, if any, for type or length of questions)		
Information literacy (service offers to demonstrate how to find answers or navigate the Web)		
Links (starting points for Web searching, Web source citation)		
Staffing (description of service providers, qualifications, subject expertise)		
Disclaimers (statements about medical or legal advice, copyright restrictions, citing online sources)		
Databases (statements regarding quality, use, limitations)		
Comments on Scope:		

CONFIDENTIALITY and DATA GATHERED:

	Yes	No
Explanation of requested personal information (minimal--name, email address; or detailed—i.e., level of information sought, homework assignment, phone number, etc.)		
Anonymity (anonymous logon possible, alternatives to providing name/email address)		
Privacy policy (clearly stated, complete, easy to find)		
Data statement (how data is used, how long it is retained)		
Comments on Confidentiality:		

GENERALCOMMENTS:

Virtual Reference Policy Checklist

Purpose: to insure that the library provides essential written policies which ensure consistent, equitable, and legal terms of service, and that they are readily available to remote patrons.

Method: This activity begins with the exploration of the library web site, as described on the preceding pages. Return to bookmarked pages that contain policy statements and examine them for the presence of issues listed on the checklist. Policies may incorporate both email and chat reference service, but some may be relevant to only one of these delivery methods. Note whether the policy is directed toward a specific service or includes both. Format—in print or online—determines the degree to which the policy is accessible to customers using the service from a location outside the library. Although most libraries do not post staff guidelines on the public web site, they may be available on an institutional Intranet. Other existing print policies should be reviewed to determine whether they are pertinent to VR service.

In some cases, policies and legal requirements are imposed by parent institutions or local government. These may determine specific aspects of delivering the service. For example, authentication and confidentiality requirements vary greatly. The checklist is not intended to determine whether a policy is appropriate to a given library, but rather to ensure that the policy is clearly explained and readily available to remote customers.

Please note that the checklist categories highlighted by bold type represent recommended minimum areas to be addressed by formal policies; this is *not* a prioritized list.

Examples: Use of Results

A careful comparison of existing policies with policy concerns delineated on the checklist can highlight errors and omissions, as well as identifying new issues that may not have been considered when policies were written or last updated. In particular, developments related to legislation at either state or national level (for example, the USA Patriot Act) may have significant impact on policies.

In one case, a library discovered that the service policy was dated, in that it referred only to telephone and in-person reference service. A number of additional online considerations were added, such as use of licensed databases and document delivery options.

This exercise also underscores the need to establish a schedule for policy reviews, a process for revisions, and identification of approving authorities.

VIRTUAL REFERENCE POLICY CHECKLIST

Evaluator: ____

Library: ____

Date/Time: ____

GUIDELINES PROVIDED: Check whether statement is related to chat, email or both, and also the format (posted to the Web or as a print document).

SERVICE

	ISSUE
	Privacy Statements
	Requires identifying personal information
	Defines who has access to identifying personal information
	Defines length of time that identifying personal information is used
	Defines transcript retention period
	Defines length of time that personal data remains attached to transcripts
	Describes uses of transcripts other than Q&A archiving, such as staff training.
	Identifies organization responsible for storage of transcripts and data
	Policy is dated, approving authority named, and process for revision specified
	Rules of Conduct
	Identifies issues like harassment, inappropriate language, rudeness, misuse of service or other negative behaviors
	Defines the consequences of online misconduct
	Specifies circumstances that result in denial of service or library card suspension
	Policy is dated, approving authority named, and process for revision specified
	Service Overview for Users
	Requirements for use of the service
	Describes limitations on types of questions handled, if any
	Specifies limits to number of questions from an individual
	Specifies time limits for questions
	Offers disclaimer for medical questions
	Offers disclaimer for legal questions
	Describes patron hardware/software requirements
	Specifies requirements for use of databases

	Service Overview for Users, continued
	Specifies hours of service
	Specifies response time?
	Describes staff operator qualifications
	Describes document delivery options
	Relates these policies to other library policies
	Policy is dated, approving authority named, and process for revision specified
	Staff Guidelines
	Competencies needed to provide service
	Required training
	Troubleshooting
	Question Referral
	Service expectations / performance standards
	Handling non-reference questions (circulation, ILL, etc.)
	Database use
	Citation verification
	Use of scripts
	Interaction with patron – greeting, question clarification, closing, chatspeak, follow-up, etc.
	Policy is dated, approving authority named, and process for revision specified

COMMENTS:

Virtual Reference Transaction Checklist

Purpose: to provide a snapshot of virtual reference service from the customer perspective.

Method: Using an identity-neutral email account (e.g., Carfan@hotmail.com – something that does not readily identify a library/staff member), each evaluator logs on to the library's virtual reference service on four to six (4-6) separate occasions, scheduled at different times on various days to ensure that the same library provider is not contacted repeatedly. In the case of a library that requires authentication (e.g., library card number), it will be necessary to establish a mock card number (or use a card number belonging to a non-library staff member). In either case, the evaluator should log on with a different, neutral name that does not indicate gender or profession. A number of mock cards created by the library for use with different question scenarios is ideal. Academic libraries normally require student ID numbers; a separate email address for each card or number should be created.

For each visit, a different question is selected from the list of scenarios provided. The checklist is used to determine whether specific service concerns are answered. Unusual, extreme (good or bad), and/or especially useful experiences, as well as overall insights, can be added in the comments section. Complete *all* sections of the checklist.

Recommendations: Use real questions that have been asked by customers in the past. If possible, obtain questions from another library of the same type. It is useful to develop a scenario or context for each question that provides the evaluator a logical way to proceed through the transaction. Note practices and issues (good and bad) that are repeated in or common to different transactions that can be used to focus on service improvement. Consider the bottom line—as a customer, would you use this service again? If "yes," why? If "no," why?

Sample Question Scenarios

1. You are: An employee working on a training manual for your boss. You are proofreading it and can't decide whether to use who or whom in a sentence. You need to have the corrected version done ASAP.
Question: When do you use who, when do you use whom?
Follow up: Whats correct?? The Tester should behave like the person who needs to implement the next phase of the product lifecycle.

2. You are: A 65 year old woman who has persistent pain in her foot and hasn't gotten a lot of help from her doctor.
Question: What is the real name for heel spurs?
Follow up: How can I find medical advice? I want some advice for getting rid of the pain in my heel. I have been wearing orthotics but they don't help.

Examples (Use of Results): Following their experiences as "Secret Patrons" in the VRS Training classes, several learners reported their discomfort with the unwelcoming and robotic feel of chat sessions when the service provider was identified only as "Librarian" or other generic term (e.g., "BPLibrarian18"). Opening a discussion of this concern on return to the library resulted in several libraries switching to the use of real first names or pseudonyms in order to make the customer experience friendlier and more personal.

When the lack of question clarification is a frequent characteristic of chat sessions, libraries often provide or enroll staff in appropriate training to improve their use of appropriate scripts and/or reference interview techniques.

To counter over-reliance on Google as a starting point for searches, staff can be trained in the use of licensed databases.

VIRTUAL REFERENCE TRANSACTION CHECKLIST

Evaluator: ____

Library: ____

Date/Time: ____

Question used/Total time for transaction:______________________________________

PLEASE CHECK ALL THAT APPLY

SETTING THE TONE:

Identification: a personal name was used for the service provider	
Greeting: the service provider greeted me personally and used my name.	
Readiness: it was clear that he/she was interested in my query and ready to provide assistance.	
Use of scripts: he/she thoughtfully integrated any scripted messages into the transaction.	

GETTING THE QUESTION STRAIGHT

The service provider clarified my question using:

☐ An open probe ☐ A closed probe ☐ Both open and closed probes

☐ Did not clarify my question

KEEPING ME INFORMED:

Options offered: he/she asked me whether I wanted to see how to find the answer.	
Clarity: the service provider's responses were clear, easy to read, and free of library jargon or personal opinion.	
Time management: the service provider kept me informed about his/her progress in finding an answer, providing a time estimate when needed.	
Responsiveness: he/she let me know what he was doing, e.g., still looking, pushing a Web page, escorting, etc.	
Technical help: the service provider provided help with any technical difficulties.	

PROVIDING INFORMATION:

Quality: he/she identified authoritative information appropriate for my need and interest.	
Pacing: the service provider gave me time to determine whether the information found actually answered my question to my satisfaction. Didn't rush me by pushing too much information.	
Citation: cited the source of the information.	
Completeness: asked if I wanted to be shown more sources.	
Referral: recognized if my question needed to be referred elsewhere.	

FOLLOW-UP:

Relevance: asked if the information found answered my question to my satisfaction.	
Further needs: asked if I had any other questions.	
Marketing: encouraged me to use the service again.	
Appreciation: thanked me.	
Survey/evaluation: I was asked to evaluate my experience with the service. This evaluation was/was not an effective tool to express my opinion of the service.	

Comments:

____

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____

Customer Use and Satisfaction Survey

Purpose: to improve virtual reference service by eliciting responses to specific questions directly from customers. Surveys can identify trends and offer maximum input for minimal effort.

Method: Many VR software applications include "pop-up" surveys (some customizable) that are automatically sent to customers at the end of a chat session. Some libraries choose not to use canned, non-customizable surveys, preferring to design a form and questions more appropriate to their community. For example, Seattle Public Library uses Catalyst, a tool designed by the University of Washington, to deliver a questionnaire. There are a number of other reasonably priced online survey software tools available, such as SurveyMonkey.com, Zoomerang.com, and Websurveyor.com.

There are many variables and design considerations related to surveys. An excellent tutorial is available at http://www.statpac.com/surveys/contents.htm.[2] Survey results can be skewed by many factors. Basic recommendations for well-designed surveys include:

- Short surveys get a greater response rate than long ones (e.g., not requiring the respondent to scroll below the visible screen; ideally 10 or fewer questions)
- Questions should be meaningful and interesting to the respondent
- Each question should logically follow the preceding one
- Grouping questions that are similar make the survey easier to complete
- The wording of questions is extremely important
- A simple response mechanism (e.g., check box or Yes/No) gets better results
- Repeating exactly the same survey questions over time and/or asking different versions of a question within the same survey can increase accuracy.
- A blank line for the patron's own comments.

For libraries that want to develop a local questionnaire, we provide recommendations for sample question packages on page 19. An extensive categorized list of questions and related response scales, compiled from a number of different survey instruments, is provided on pages 20-23.

In order to minimize the length of the survey, questions can be changed at regular intervals to focus on different aspects of VR service. Another variation maintains two or three primary questions, but also includes a set of changing ones. The survey may be administered during selected sample periods rather than continually. One of the most useful "bench marks" for interpreting survey results are comparisons with the library's prior surveys. With that in mind, future surveys should follow a similar scheduling pattern.

Interpreting survey results is an exercise that improves with practice.

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[2] Prepared by StatPac, Inc., "authors of professional survey software." Minneapolis, MN. 1997-2004.

Examples: Use of Results

When compiling survey results, King County Library System noted a very high correlation between "Leisure and General" as an answer to "What are you using this for?" and a negative response to "Did you find the service effective in meeting your needs?" This led to an examination of transcripts to determine the problem—many of the questions were not geared to a chat session. That is, the operators were unable to offer reader's advisory or other real-time responses that would provide an appropriate answer. In turn, this pointed to the need for referral to other resources via email, telephone, or recommending a visit to a branch library.

Seattle Public Library learned that one survey question dear to the hearts of reference staff members was uninteresting to patrons: "Did the Library staff member tell you where he/she found the information?" The time needed to provide a citation often was more than most patrons wanted to spend in chat. A suggested alternative is to ask whether the patron wants the citation and then offer it in answer to a positive response.

King County Library System also observed that there are some prankster patrons that can skew results if they ask frequent questions and then complete the survey with all negative responses. Reviewing individual transcripts linked to survey responses can help identify these anomalies, which can then be subtracted from results.

Virtual Reference Survey Question Packages

Core Questions	Additional Questions
Administrative	Continuing Education
Clairty	Friendliness
Speed	Location of User
Demographics	Marketing
Target group	Psychographics
User Satisfaction	Technical Problems
	Web Site

For best results, try one of these sample question packages:

Short and Sweet--
Have you used this service before?
Why did you use the service today?
How well did we understand your question?
Did the service provide useful information for you today?
Did you receive an answer in time to meet your needs?
Would you use this service again?

Demographic and Marketing--
What is your age (use scale)?
Why did you use the service today?
Where did you use it from?
How did you find out about this service?
How often do you visit the library in person?
How well did we understand your question?
Did the service provide useful information for you today?
Did you receive an answer in time to meet your needs?
Would you use this service again?
Would you recommend this service to someone else?

Quality Assurance--
Have you used this service before?
How quickly did we understand your question?
How friendly was the library staff?
The quality of library staff service in response to your question was?
Did the library staff member ensure you got what you needed?
Were you satisfied with the response you received to your question?
Did you receive the answer in time to meet your needs?
What would make this service better?
Would you use this service again?

Categorized Sample Survey Questions

Administrative

- Based on this experience, will you use our service again? Yes/No
- Entry Point
  - Home
  - Library
  - School
  - Work
  - Other
- Have you used this service before? Yes/No
- I have used electronic resources from the library before. Yes/No
- I prefer asking questions online, using email or chat. Yes/No
- I used my local library first. Yes/No
- Is this the first time you have used this service? Yes/No
- Is this your first time using our live chat service? Yes/No
- Should a live chat service continue to be offered by the Library? Yes/No
- Should we continue to offer this service? Yes/No
- This is a needed service and should be continued. Yes/No
- This was the first time I used this service. Yes/No
- This is the first time I've used the Library. Yes/No
- This is the library I use most often. Yes/No
- Will you use the service again? Yes/No
- Would you use this service again? Yes/No

Clarity

- Did the Library staff member tell you where he/she found the information, such as quoting a source or giving you the address for a Web site? Yes/No
- Did you feel that the Library staff member understood your question? Yes/No
- How easy was it for you to understand the librarian's answers? Easy/No Opinion/Very difficult
- How quickly did the librarian understand your question? Very quickly-Average-Very slowly
- How well did we understand your question? My question was completely understood / My question was partially understood / My question was not understood

Continuing Education

- After this session, I am more aware of different kinds of information resources Strongly Agree/Neutral/Strongly Disagree
- Did the librarian showed your how to use the catalog, a database or a Website so you can do it on my own next time? Yes/No/Still need more instruction
- I received an answer that helped me locate additional information regarding my question? Yes/No/Neutral
- The librarian guided me to appropriate information Strongly agree/Neutral/Strongly disagree

Demographics

- Age
- How many of these have a library card?
- How many people live in your home or apartment?
- How often do members of your household visit the library?
- Occupation
- Previous library use

- Repeat Users
    - Have you used this service before
    - What was your previous experience
    - Would you use this service again
- Residency
- What are their ages?
- What is the primary purpose of these visits?
    - Research
    - To attend an activity or event
    - To check out a book for leisure reading
    - To educate/entertain a child
    - To read periodicals and newspapers

Friendliness

- Did the Librarian address you by name? Yes/No
- Did you feel the librarian fully understood your question? Yes/No
- How friendly was the librarian? Veryfriendly/Interested/Nice/Rude/Abrupt/Very unfriendly
- Librarian was helpful Unsatisfied / Satisfied
- The librarian was courteous. Yes/No/Neutral
- The librarian was helpful. Yes/No/Neutral
- The Librarian was knowledgeable Unsatisfied/Satisfied
- The quality of the library staff service in answering this request was: Excellent/Good/Poor

Location of User

- Community Center
- Home
- In-Library
- School
- Senior/Retirement Center
- Work

Marketing

- What would make this service better
- Where did you find out about our service? or where did you hear about this service?
    - Library Website
    - At School
    - Flyers/brochures/bookmarks
    - Online ads
    - Radio
    - Bus/transit signage
    - Billboards
    - From a friend/word of mouth/relative
    - Newspapers or newspaper articles or ads
    - Library staff
    - Surfing the Net
    - Promotional items (mouse pads/notepads/pencils/book bags)
    - Group presentation
- Was the service easy for you to locate?
- Where/how did you find out about this service
- Would you recommend this service to friends, coworkers, etc.
- Would you use this service again

Psychographics (Lifestyle characteristics)

- Do you ride the bus to work?
- What newspapers do your read?
- What radio stations do you listen to?
- What type of work do you do?

Speed

- Did this session save you a trip to the Library?   Yes/No
- Did you get information fast enough?   Yes/No
- I received the answer in time to meet my needs.   Yes/No/Neutral
- It was important that I received assistance at this particular time, and not wait until I came to the library.   Strongly agree/Neutral/Strongly disagree
- The ease of using this online reference service is?   Very easy/Easy/Difficult/Very difficult
- The service was easy to use   Unsatisfied / Satisfied
- Was it important that you received assistance at this time, rather than waiting until your next visit to the Library?   Yes/No
- Your question was answer quickly   Unsatisfied / Satisfied

Target Group

- Please tell us about why you are using the service
  - Work related
  - General
  - Checking to see if your own an item
  - Checking on my account information (fines/reserves/etc.)
  - Homework (K-12)
  - Leisure
  - Continuing education
  - Research
  - College assignment
- Purpose (reason for use)—Why did you use this service today

Technical Problems

- Did you experience any technical problems
- Did you experience any technical problems using this service?   Yes/No   If yes, please explain
- Did you experience connection problems
- Did you experience problems with your Web browser (such as Internet Explorer, NetScape, Opera)

User Satisfaction

- Are you satisfied with the hours of service? Yes/No
- Did the Library staff member make sure that you got what you needed?   Yes/No/Not really
- Did the service provide useful information for you today? I got everything I needed—I got most of what I needed—I got a little of what I needed—I received no useful information
- Did you find the service effective in meeting your needs?   Yes/No
- Did you find what you were looking for?   Yes/No/Somewhat
- Did you get what you needed
    - Useful information
    - Staff understood what I needed
- Did you receive enough information to answer your question?   Yes/No/Somewhat
- Did you receive useful information? Yes/No
- Do you know where the answer came from

- How satisfied were you with the
    - Answer
    - Staff understood what I needed
    - Process
    - Service
    - Staff knowledge, friendliness, etc.
    - Time
- How satisfied were you with the answer you received? Not Satisfied—Satisfactory—Very Satisfied
- How satisfied were you with your live chat experience? Very Satisfied/Satisfied/Very Dissatisfied
- I received a better answer from this resource than I would have found on my own. Yes/No/Neutral
- I received an answer that helped me locate additional information regarding my question. Yes/No/Neutral
- I received sufficient information in response to my question. Yes/No
- I would recommend this service to someone else. Yes/No
- If not satisfied, why?
- If you are not satisfied with the results you received from this service, please tell us why? I had technical problems – the Library staff member did not understand my question / the Library staff member did not make sure I had gotten what I needed
- Overall are you satisfied with the results you received from this service? Yes/No
- Was the service easy to use? Yes/No
- Were you satisfied with the answer to your question? Yes/No
- Were you satisfied with the response you received to your reference question? Very Satisfied/Somewhat Satisfied/Not Satisfied
- Will you use this service again? Very Likely/Maybe/Never
- Would you recommend our online chat service to a friend? Yes/No
- Would you recommend this service to a friend? Not Likely/Maybe/Very Likely
- Your question was answered completely Unsatisfied / Satisfied
- Your question was answered correctly Unsatisfied / Satisfied

Web Site

- From our service name, did you understand what to expect? Yes/No
- Have you read our service statement? Yes/No
- Is it important for us to have a service statement? Yes/No
- Was our link easy to find? Yes/No
- Was the service easy for you to locate?
- Was the link to our service easy to find? Yes/No

Sources:

Girvin Strategic Branding & Design, *King County Library System and University of Washington Virtual Reference Services: Marketing Guideline*
King County Library System (WA) patron survey, LSSI patron survey
McClure, Charles R. et al, *Statistics, Measures and Quality Standards for Assessing Digital Reference Library Services: Guidelines and Procedures.*
QuestionPoint patron survey
Seattle Public Library (WA) patron survey
SmartyPants (Denver Public Library, CO) patron survey
Tutor.com Virtual Reference Toolkit patron survey
University of Washington patron survey

Level II

The first tool on this level utilizes computer-generated data, which requires that choices be made in terms of the specific information to be analyzed and the ways it can be used to inform management decisions. The Provider Self-Evaluation can be used as a prelude to the Peer Review process described in Level III.

Web Site Usage

Purpose: to analyze data related to traffic and use of the library's Web site in order to improve service and increase use of VR.

Method: There is a great deal of information buried in Web server logs—retrieving and analyzing it is the trick. The methodology for analysis will depend on the particular log in use at the library. Logs provide quantitative data for many areas which can be used to compare usage over time, identify unusual activity or unsuccessful requests (e.g., the infamous 404 "file not found" messages), report the popularity (or *vice versa*) of specific Web pages, and much more. Software packages such as Web Trends, NetTracker, AccessWatch and others track, compile, and analyze this data, but it takes a human brain to interpret the results usefully. The same applies to statistical reports provided by VR software vendors; it should be noted that the type of information and level of detail supplied varies greatly, but here are some typical categories, with a few sample statistics from each (taken from Web Trends).

- General statistics (Average hits, page views and visits per day; # unique visitors)
- Resources accessed (Most popular pages, top entry pages, most downloaded files)
- Visitors & demographics (New & returning visitors, top geographic locations of visitors)
- Activity statistics (by day of week, hour of day, length of visit)
- Technical statistics (404 errors, server errors)
- Referrers & keywords (top referring URLs, top search engines with search phrase detail)
- Browsers & platforms (top browsers used, visiting spiders)

Virtual reference software applications can add data for consideration, such as:

- Number of chat sessions—hourly/daily/monthly; total, by staff member, etc.
- Average length of sessions
- Average response time

All of this information can be correlated used for many reasons, including:

- Tracking usage activity by day/hour in order to determine staffing needs
- Determining the overall use of VR to justify, modify or expand service
- Verifying in-house and remote use of VR
- Identifying clientele and their activity level

Caveat: remember that server logs track computer behavior, not user behavior. A customer may log on to the VR "picker page,"[3] but then choose to phone the library rather than use the chat service. Further, it's important to understand the difference between hits, page views, visits, and other data categories. Check the definitions provided by the software package.

Examples (Use of Results):

A large public library system extended their vendor contract to provide after-hours backup in order to extend the service hours to 24/7. Subsequent examination of the software statistics showed that service traffic more than doubled within the first month of backup service, and that most of the added volume took place during library open hours. Offering a constantly available service dramatically increased usage, providing justification for the added cost.

[3] Picker page: a web page that provides information on all available forms of reference service (such as chat, email, telephone, in-person, etc.) from which the customer can select the most appropriate.

Provider Self-Evaluation

Purpose: to improve individual performance in providing virtual reference service, including skills in communication, reference interview, customer service, Internet searching, and other relevant aspects.

Method: The purpose of the self-evaluation must be explained to the provider before it is undertaken. The Virtual Reference Transaction Checklist (page 15-16) can be offered as a guide, but it should be made clear that no paperwork will be collected at the end of the exercise. This is a private, individual process.

Use or select questions from the lists of Self-Evaluation Questions on page 27. If the transcripts for review are selected by the provider, they should meet set criteria. For example:

- Six to ten transcripts should be reviewed
- Transcripts should represent a variety of complex transactions
- Transcripts should be selected over a specified time period, representing different days and times

At the end of the self-evaluation, the provider should be asked to identify one area in which he or she needs improvement, suggesting methods for doing so if appropriate (e.g., training, additional practice, work with mentor).

Examples (Use of Results):

Library staff members find reading their own transcripts revelatory. Phrases that seemed reasonable and appropriate when typed often evoke a different, sometimes unpleasant tone when read. They also recognize awkward wording and over-use of scripted messages. Online techniques and behaviors can be readily improved when the provider sees the results of past work in print, and reading one's own transcript without oversight is non-threatening.

Virtual Reference Service Provider
Self-Evaluation Questions

A list based on the "Guidelines for the Samuel Swett Green Exemplary Virtual Reference Award:

1. How long did you keep the caller waiting?
2. Were you dealing with more than one caller when involved in this session?
3. Did you use open-ended questions at the outset of the session to clarify the information needed?
4. Did you ask what other resources the caller had already checked?
5. Did you use a close-ended question during the reference interview process to determine that you understood the caller's inquiry?
6. Did you tell the caller what you were doing as the session progressed?
7. Did you use a close-ended question such as "Did this answer your question" before ending the session?
8. Did you answer the question correctly?
9. Did you answer the question completely?
10. Did you need more time to answer the question?
11. Did you have to refer the caller to other resources based on the caller's inquiry?
12. Did you cite specific, authoritative source(s) to support your answer?
13. Is there evidence of the caller's satisfaction with information provided or help given?

A list based on a Librarian Survey from Wright State University Libraries:

How satisfied do you think the caller was with the chat service?
☐ Very satisfied
☐ Somewhat satisfied
☐ Somewhat dissatisfied
☐ Very dissatisfied

A list based on the Reference Session Evaluation Checklist from QandANJ.org:

1. Did you use open-ended probing questions to elicit the caller's specific question?
2. Did you maintain a steady dialog with the caller?
3. Did you keep the caller informed about your activities?
4. Did you communicate what steps the caller was expected to do next?
5. Did you make appropriate use of scripted messages?
6. Did you inform the caller you were sending an Web site in answer to the inquiry before actually sending it?
7. Did you explain to the caller what you sent?
8. Did you provide the caller with instructions on how to use the resource, site or information sent?
9. Did you explain where the caller could find the answer within the site or information sent?

10. Did you appropriately refer the call?
11. If you needed to contact the caller later via email, phone or other means, did you do so?
12. Did you ask the caller if you had completely answered his/her question?
13. Did you send a Web page or only a URL?
14. Did you successfully send files, Web sites, proprietary database information, or screen shots?
15. Did you evaluate the information, Web site, or proprietary database information before sending it to the caller?

A list developed by Nancy Huling for use at the Suzzallo/Allen Libraries, University of Washington:

1. Personalized or friendly greeting?
2. Reference Interview? Is it thorough enough?
3. Allows time for user to ask questions and waits for user to confirm when question is asked?
4. Source for answer is cited?
5. Guidance/instruction provided if appropriate?
6. Use of co-browsing/escort feature used appropriately?
7. Follow-up needed? Any indication of doing so, if necessary?
8. Closing interaction—asks if user has any other questions?
9. Other comments?

If appropriate to the VR application :

Did you assign an appropriate Resolution Code (a session status such as Complete, Incomplete, Prank call, etc.)?

Level III

Using the evaluation tools provided at this level require significantly more time, expertise, and other resources. However, the results offer extremely valuable qualitative information, insights, and ideas for staff and administration.

Peer Transcript Review

Purpose: Peer review is a powerful tool for assessing staff effectiveness in providing virtual reference service.

Method: This process must be implemented with great care in order to neutralize concerns about how the information will be used (i.e., effect on performance appraisals), who will participate, the role of the facilitator, and the overall potential it offers for improving service. Providing the context in which the review is being conducted and explaining the setup for the actual session to the participants is very important in order to defuse any controversy. In order to encourage participation and ensure that all voices are heard, the length of the session and number of members should be limited (e.g., ninety minutes/eight staff).

The staff member who selects transcripts should be otherwise uninvolved in the process. Transcripts for review—email, chat, or a combination—are selected to represent a range of service issues (see the Virtual Reference Transaction Checklist on pages 15-16). Ideally, these are transcripts of sessions completed by staff participating in the peer review. Include a balance of complex sessions that provide examples both of good practices and those needing improvement. Transcripts that include time date stamps allow discussion of response time. The selecting person also removes all identifying information in order to maintain anonymity.

The facilitator should be recruited from a department that has little or no interaction with the peer review participants; preferably someone from outside the library. Prior to the session, he or she should read the transcripts and highlight noteworthy issues, in case the group does not mention them. (For example, time lags in chat and the order in which scripts are used.) Provide a brief agenda and list of transcript criteria to all participants prior to the session.

This is an informal, anonymous process. The facilitator's primary duties are to maintain the discussion, prompting individuals if necessary. Allow participants about one minute per page to read them. The facilitator should begin with a description of the purpose of the peer review and session guidelines. For example:

- The facilitator may take notes, but will not record "right and wrong" transcript information. This process is intended to look at service provided by everyone, not by individuals.
- The session will begin and end on time.
- Everyone must understand and agree on the purpose of the review—to improve customer service.
- Feedback should be positive, open-minded, and sincere.
- Participants will listen respectfully, without interruptions.

- Supervisors should not be present during the peer review.
- All identifying information should be removed from transcripts. At the end of the session, transcripts should be shredded.
- *At the end, the facilitator should remind participants that what was said in the room stays in the room—it should not be discussed outside the session.*

Following the review, participants should be asked to comment on the process. This information will help ensure the success of future, similar events.

Example of results: Seattle Public Library Virtual Reference / Peer Review Questionnaire Feedback (Note: a combination of email and chat transcripts were reviewed.)

1. Did you learn anything from this exercise? What was the best part of our discussion today?
   - Yes—I answer a lot of QP questions & have developed my own style. Today I was reminded of areas where I could do better—this session has got me out of a rut!
   - Yes. Hearing from individuals who actually wrote these.
   - Yes, opportunity to see how colleagues answer questions
   - Yes, it made me think about things. We've never really talked it over in the dept.
   - Interesting to have evaluation of question I recognized. Liked the expression of criteria—
   - Yes excellent use of an hour. I really realized importance of introductory statement.
   - I liked the anonymous approach.

2. Would you like to do this kind of group review and discussion on a regular basis (2-3 times a year)?
   - Yes—I do like the discussion taking place in a small group, though. It's great to talk about doing reference work!
   - I would rather it be done by each individual department with co-workers.
   - Quarterly.
   - Yes, if time allows.
   - Some of it would be great. We should think of some way to extract the conclusion and share with other staff.
   - Yes (underlined). More (underlined).
   - I don't think this is necessary.

3. Do you have any suggestions or comments to improve this review process?
   - I loved it. Maybe allotting more time to the session so that we could cover more questions.
   - None.
   - Other subject matters HIS, ART, LIT, etc. Other dept's other than just QIC/GRS.
   - I liked the way it went.
   - Maybe with some practice it could be less diffuse—or we could get the transcripts ahead of time and not have to take discussion time.
   - More time. Then we need to translate what we come up with into more specific standards for our use.

PEER TRANSCRIPT REVIEW AGENDA

10:30—10:45: Introduction

10:45—11:45: Discussion

11:45—12:00: Wrap-up & Questionnaire

TRANSCRIPT/REFERENCE INTERVIEW CRITERIA

Salutation/Interest:

- Librarian opened with a welcoming or encouraging greeting.
- Librarian expressed interest in the question and the patron's problem.

Acknowledgment of Question/Clarification/Answer:

- Librarian acknowledged the question being asked.
- Librarian attempted to clarify the question.
- Librarian demonstrated an understanding of the question being asked by restating it or referring to specific details in the answer.
- Librarian responded to the question fully or referred the question or patron to another agency.

Cite the Source/Instruction:

- Librarian cited the source used to answer the question.
- Librarian instructed the patron in how they found the information.
- Librarian explained the search strategy for the patron or recommended options for further research.

Closing:

- Librarian closes with signature or department information, and asks patron if the information provided answers their question.

Transcript Analysis

Purpose: to evaluate the success of virtual reference service providers, recognize staff training needs, identify resource use and trends, and/or discover common questions or topics and ways to answer them effectively.

Method: The Virtual Reference Transaction Checklist on pages 15-16 can also be used to evaluate service effectiveness. As with peer transcript review discussions outlined on pages 29-30, it is important to establish the context for the analysis.

After selecting a random sample over a specified time period, transcripts can be categorized in a variety of ways, focusing on different aspects of service. (The number of transcripts evaluated should relate to the overall volume of service. A low-traffic service will require a higher percentage of transcripts for a high-quality analysis.) The purpose of the evaluation will determine the way in which transcripts are analyzed. For example:

1) Operator type – to assess differences in service quality
    a) Full- or part-time
    b) Local library employee
    c) Partner/cooperating library employee
    d) Vendor employee
2) Customer type – to assess differences in customer needs
    a) Academic status (e.g., student, faculty)
    b) Age (e.g., adult, teen, senior citizen)
    c) Gender
3) Completed – to assess differences in service delivery techniques and/or service quality
    a) Ready reference/brief answer
    b) Research
    c) Instructional
    d) Referral
4) Resources used – to identify collection development needs and/or use patterns
    a) Web-based
    b) Local databases
    c) Local catalog
    d) Print/other format
    e) Topical
5) Incomplete – to identify software/telecommunications issues or to assess service quality
    a) Technical interruption
    b) Premature closing by operator or customer

The Virtual Reference Transaction Checklist on pages 15-16 can also be used to evaluate the effectiveness and quality of service provided.

Examples (Use of Results):

A large metropolitan library noted that too few questions requiring subject expertise were referred to other departments or libraries that could have answered the questions more thoroughly and/or quickly, or otherwise provided service appropriate to the specific patron and question.

In another case, tying transcript analysis to survey question answers ("Overall are you satisfied with the results you received from this service?" Answer: "No") revealed that there was a problem with the link to Homework Help from within the chat reference service. Subsequently, a direct link to Homework Help was provided from the selection of choices on the picker page.

One more example of linking survey results to transcript review: a suburban library system correlated the category "other" use to "no satisfaction" to cases of lost pin numbers, invalid library card numbers and similar instances in which it was necessary to request that the customer make a personal visit to library or show proof of identification. Customers were dissatisfied because they want to do it online. For privacy reasons, the library will not provide online assistance. They might develop an explanatory script for this (for example, "In order to protect confidentiality, we cannot divulge personal information over phone or via live chat").

Focus Groups

Purpose: Focus group interviewing provides qualitative data based on personal experience. The face-to-face interaction of participants encourages brainstorming from different perspectives and is an ideal way for libraries to hear directly from the "horses' mouths." They can be used to determine customer assumptions, expectations, and preferences. Understanding these concerns helps us tailor virtual reference service to meet the real needs (rather than our perceptions of them) of the library community.

Method: Begin by asking these questions:

1. What kind of information are we seeking?
2. What customers should be represented in the groups?
3. Where should the groups meet?
4. Who should convene the groups?
5. How much project money should be spent on such an effort?

Focus groups should be limited to six to ten members who share common knowledge, experience, or characteristics. Recruitment will be the most time-consuming part of this undertaking. Select members for each focus group from priority customer audiences (such as businessmen, parents, arts and humanities faculty, distance students, etc.). There are innumerable possibilities for recruiting volunteers:

- A group of teens: Contact a high school teacher, youth organization, or YA librarian for a list of recommended names. Consider convening the group via chat (but be prepared for silliness).
- A group of senior citizens: Contact the genealogy or local history society.
- A group of businessmen/women: Contact Rotary Club, the Business & Professional Women's Association, or Chamber of Commerce.
- A group of current VR customers: Provide a script asking for volunteers at the end of transactions with repeat VR users, such as
    - "We are looking for volunteers to participate in a focus group that will discuss our chat service to improve it and find new ways to help our customers. Would you be interested?" If the answer is "yes" (and be prepared for a lot of "no"s), you can request a telephone number or email address for exchanging needed information.

Even if you contact volunteers by telephone, send a personal invitation to each participant—include brief description of the event, the date and time, location, contact names and numbers. Postcards work well--they display nicely on a refrigerator. Meeting in a library setting underscores the connection between the online service and the library institution. The session should last ninety minutes to two hours, maximum, with a planned fifteen-minute break.

Prepare five to ten jargon-free questions. These should be asked in a logical order from general to specific, and should be open-ended to encourage maximum participation. Choose a moderator who is sociable, interested in virtual reference, has good communication skills (especially listening), is well-organized, and has a good short-term memory.   If group members do not have experience using virtual reference service, ask them to try it out once or twice prior to the session. Alternatively, it can be useful to ask customers questions that elicit their vision of an online, real-time information service, then compare their ideas to the actual service offered.

Refreshments are mandatory and incentives highly recommended. For tight budgets, consider asking local merchants or library vendors to donate items—anything from mousepads to latté coupons will be appreciated.   Some libraries pay participants a small stipend for participation.

Recommended equipment:

- Poster board/markers for recording ideas
- Tape recorder to record entire session. A video camera can be used, but may discourage participation or be distracting.

Informal seating is preferred, although many participants like a writing surface for doodling, placing personal items, etc.

Page 37 provides an outline of a typical focus group process.

The most difficult part of conducting focus groups is interpreting the findings. If an outside consultant is employed, they should provide an objective analysis. Tips for analysis include:

- look for themes that are common to all groups
- identify areas or issues that stimulated the most discussion
- pay attention to unexpected and/or creative approaches

Examples (Use of Results):

The Statewide Virtual Reference project convened four focus groups (re-entry workers, folks aged over 50, Hispanics, and teens) in early 2002. Eight questions were asked, ranging from "What type of questions do you need help with in your day-to-day life?" and "If you have a computer at home, what is it mainly used for?" to "What would be your dream of getting information in the simplest way?" A number of key points were made that helped shape project activities, especially marketing:

- "I didn't know the library could help with that"
- We are a 24hour-7day society
- Yellow Pages work – library classifications are too confusing
- Libraries need to advertise and market
- Need library signage that is simple and clear
- We have the mentality of fast food – it has to be quick

A university library convened five focus groups of undergraduate and graduate students, asking these potential users what they wanted in a virtual reference service and how the library could get their attention. The results offered a wealth of information. Especially useful were answers to questions that covered expectations for web site design and marketing, such as:

- "Provide a design suitable for scanning—don't want to read"
- "Must have user friendly appearance that appeals to even the non-computer literate"

- “Give me the simple stuff”
- “Advertise who VR works for, what they can expect”
- “Word of mouth the best marketing tool of all”
- “Be better at getting the idea out there—many don’t know”
- “Go the residence halls and have a hook up and staff to help. Have food.”

PLANNING AND IMPLEMENTING A LIBRARY FOCUS GROUP PROJECT[4]

Phase I	Identify and discuss the problem/question to be researched
	Decide that focus groups are the appropriate method to collect data
	Identify those who will be involved in implementing the project and what roles each will play
	Decide on the participant pool and criteria for selections
Phase II	Begin to formulate questions
	Draw up a budget, time-line, and plan of action, including a list of tasts, and equipment and supplies if needed
	Decide if and how participants will be remunerated
	Estimate number of sessions to be held
	Develop screening questions as needed for selecting participants
	Decide on sites, dates, and times of sessions
Phase III	Work with appropriate groups, individuals to identify possible participants
	Screen potential participants and get commitments for more people than the minimum required
	Finalize questions
Phase IV	Call to remind participants 1-2 days before session
	Set up room with table, chairs, refreshments, recording equipment
	Run session(s) and record discussion
	Hold debriefing immediately after session(s)
Phase V	Have notes and tapes transcribed
	Review transcription, notes, and tapes as needed to analyze data
	Discuss findings with team members, check back with participants as needed for verification
	Write up findings and prepare report (oral or written) for library management
	Discuss findings with management
	Make decisions based on project findings and convey decisions to staff
	Thank participants and inform them of results and decisions made

[4] Taken from *Focus Groups for Libraries and Librarians*, chapter 7. (see Bibliography)

Usability Testing

(***N.B. This is not used to evaluate quality of service***)

Purpose: To identify and correct deficiencies in the interface and Web presentation of a virtual reference service.

Method: 6-10 participants are each observed and questioned individually by a test monitor in same room. The test should last no more than one hour, and each participant should be assured (and reassured) that the VR interface is being tested, not the person. Each participant is given the same question to ask the library provider (object is not to assess service quality, but rather usability); participants are scheduled separately. If possible, tape record the session. The monitor should take careful notes of all participant comments.

Test the complete use of service Web pages, from selecting library Web site to the final delivery of transcript, according to vendor features. As the participant proceeds from beginning to end, they should be asked to comment on their progress. The monitor should prompt with questions about aspects of the service. The questions will depend to some degree on the specific features provided by the VR software application. The following list provides suggestions for aspects of the interface that might be considered, with a range of responses in parentheses:

- Links--placement, name, size and color, # clicks to reach login page (appropriate, visible, attractive, excessive, confusing, unattractive, erroneous)

- Navigability (logical progression of links, easy to locate on Web page, confusing, erroneous)

- If vendor-designed elements that cannot be modified (fields, buttons, entry boxes) are included in the test, be sure to forward the results to the vendor for any needed correction/modification.

- Required vs. optional data entered (appropriate, unnecessary, too much)

- Library-customized or added elements—fields, buttons, dialogue boxes, headings (understandable, logical, useful, unnecessary, confusing)

- Default screen/site displayed at log-in and when customer enters service (appropriate, useful, confusing, irrelevant)

- Descriptions/identifiers for elements (appropriate, understandable, precise, confusing, wordy); include participant suggestions for alternatives)

- Info provided on completion (appropriate, complete, incomplete, unnecessary)

- Transcript format & delivery (timely, complete, useful, not timely, unnecessary, confusing)

In *The Handbook of Usability Testing*, Rubin notes that monitoring well requires repeated practice. If possible, assign or hire an experienced monitor.

Rubin's guidelines for monitors:

- Monitor the session impartially
- Be aware of the effects of your voice and body language
- Treat each new participant as an individual
- Don't "rescue" participants when they struggle
- If you make a mistake, continue on
- Make sure that the participants are really finished with a task before going on to the next one
- Use humor to keep the session relaxed and indicate to the participants that there is no right or wrong response
- If appropriate, use the "thinking aloud" technique
- Probe and interact with the participant as appropriate
- Assist the participants only as a last resort

Use a checklist—take the test yourself, conduct a pilot test, adjust it, check out the equipment/environment.

Ask the participant to complete a posttest Usability Survey, then debrief him/her. Take a moment to scan the survey, highlighting any issues that warrant discussion. Begin the debriefing with an open question ("So, what did you think?"), letting the participant choose the topics that are most important to him/her. Your own questions should begin with general issues, and then move to specifics. The focus should be on understanding problems rather than solving them.

When all usability sessions are complete, compile and summarize the data. These results should be shared and discussed with all staff members who have responsibility for implementing the service on the Web and recommendations for modification or improvement should reflect their input.

Examples (Use of Results)

The Washington State University library conducted usability testing (ease of navigation and comprehension of information displayed) of its WebPac and electronic indexes in 1998. The results revealed a wide disconnect between the information provided in these online resources and user understanding. Examples: 1) in the catalog, users did not understand cross-references or the use of multiple call number schemes; and 2) in databases, full-text choices were not obvious and descriptions were too wordy. Concepts were not understood and content could not be interpreted.

A team reviewed all identified problems areas, producing a table of tasks, problems, responsible individuals, and actions needed. They separated issues that could be solved locally and submitted a series of enhancement requests to the catalog vendor. The User Education

Department was given a list of problem areas to be included in instructional sessions. The test of electronic indexes resulted in changes such as converting an alphabetical list to a drop-down menu from a table format, shortening subject category descriptions, eliminating some confusing instructions and adding information on restrictions.

This process made WSU team participants "true believers" in the value of usability testing, and the library is committed to continued testing.[5]

[5] Chisman, Janet, et al. "Usability Testing: A Case Study," College & Research Libraries, November 1999.

[LIBRARY NAME / NAME OF SERVICE]
Usability Survey

Name____

Date____

Please answer the following questions based on your experience using [Library Name] [name of virtual reference service]. Where appropriate, we would appreciate your explaining answers in the space provided below the questions.

1. Overall, I found the [name of service] easy to use (check one).

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

2. I found the following aspects of [name of service] especially easy to use and/or understand. (Please list up to three items.)

3. I found the following aspects of the [name of service] particularly difficult to use and/or understand. (Please list up to three items.)

4. I found the [name of service] interface (links, buttons, text boxes) an easy method for exchanging questions and answers with a library operator (check one).

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

5. Using the following ratings, please circle the number nearest the term that most closely matches your feeling about the [name of service]:

Simple	3	2	1	0	1	2	3	Complex
Hi-tech	3	2	1	0	1	2	3	Lo-tech
Reliable	3	2	1	0	1	2	3	Unreliable
Easy to use	3	2	1	0	1	2	3	Hard to use
Friendly	3	2	1	0	1	2	3	Unfriendly
Attractive	3	2	1	0	1	2	3	Unattractive
Clear	3	2	1	0	1	2	3	Confusing
High quality	3	2	1	0	1	2	3	Low quality
I like it	3	2	1	0	1	2	3	I dislike it

6. Please rate aspects of [name of service] by checking the term that most closely reflects your opinion.

   A. [Name of service] was easy to find.

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

   B. The instructions for using the service were clear and precise.

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

   C. The language used for labels and descriptions was clear and precise.

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

   D. The amount of explanation on the screens was adequate for exchanging information with the library operator.

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

   E. It is useful to receive a transcript of my [name of service] sessions.

☐ Strongly agree ☐ Agree ☐ Neither agree nor disagree ☐ Disagree ☐ Strongly disagree

7. Please add any comments in the space below that you think will help us evaluate the way that [name of service] works. Note that we are not assessing the quality of the service provided by the library operator in this test. We would especially appreciate your input on the following topics:

   - Features that are essential for you to use the service
   - Features that are unnecessary
   - Features that you would like to see added

Cost

Purpose: In order to develop budgets, make management decisions about service levels and scope, allocate resources, and plan for the future, it is critical to know the cost of virtual reference service.

Method: Unfortunately, there is no good analog model for calculating costs of virtual reference service. Simple cost per transaction is easy and widely used, but it results in a figure that suggests that costs could be lowered by answering as many questions as possible per hour, ignoring quality considerations. One good model was offered at the 2003 Virtual Reference Desk Conference by Matthew Marsteller of Carnegie Mellon University.[6] He posted a calculator on the Web that allows the user to input data and calculate results for a live chat reference service. Both normal and high traffic models are provided. An example is illustrated on the next page. While it has limitations, it is a very useful tool. Data (formulas defined below the spreadsheet) includes:

- Number of hours of service per week
- Number of service points
- Average work week in hours
- Average length of reference transaction in minutes
- Reference transactions per month
- Number of committee/task force/work group meetings per year
- Average meeting attendance
- Labor cost of meetings (assuming 1 hour meetings) per year
- Cost of software per year per seat
- Cost of software per year
- Cost of software per minute of service
- Mean salary for librarians per hour
- Mean salary for librarians per minute
- Estimated labor cost per reference transaction
- Estimated total compensation per reference transaction (with fringe benefits)
- Estimated total labor compensation per month
- Estimated total labor compensation per year
- Estimated total cost per year
- Estimated total cost per year with facility and administrative costs included

[6] Marsteller, Matthew and Susan Ware. "Models for Measuring & Evaluating Reference Costs: A Comparative Analysis of Traditional and Virtual Reference Services," November 17, 2003. PowerPoint presentation available at http://www.vrd2003.org/proceedings/presentation.cfm?PID=255.

Example of results: From the final grant demonstration project report of Spokane Falls Community College, September 2003: "Some library staff have expressed concerns about the cost/benefit ratio of providing the virtual reference service. However, with grant funds providing seed money to purchase the software and training as well as 14 hours of staff time each week, the cost/benefit ratio of the project seems to be heavily in favor of the project. For example, SFCC librarians provided 243.5 hours on the ASK US 24/7 schedule between January 1 and August 5, 2003 at a cost of approximately $8,655, only 6% of the entire professional salaries budget. However, because each librarian working on the virtual reference desk was engaged productively in tasks such as reading e-mail, collection development and other professional activities when not actively engaged with a patron, attributing the entire cost of the time to virtual reference does not seem reasonable.

A better way to assess the cost/benefit ratio might be to compare the cost of staff time to the number of hours the service is available to patrons. In this regard, patrons from SFCC had access to virtual reference services for over 5208 hours between January and August at a cost of around $1.66 per hour. By this measure, the service is truly affordable and reasonably priced resulting in a positive cost/benefit ratio."

Synchronous Digital Reference Cost Calculator
Available at:
http://www.andrew.cmu.edu/user/matthewm/vrd2003/DigRefCostModel.html

The spreadsheet below was copied directly from Matthew Marsteller's web page, cited above. Individuals can enter data into the spreadsheet, select "Automatic Recalculation," and print the results.

Normal Traffic (NOTE: a link to a Heavy Traffic Calculator is available at the above URL)

Caution: if your "Reference transactions per month" are greater than the number to the right, then you need to be using the heavy traffic model (see link below).	520		Cost of software per year per seat	4,200.00
Number of hours of service per week	20		Cost of software per year	4,200.00
Number of service points	1		Cost of software per minute of service	0.07
Average work week in hours	37		Mean salary for librarians per hour*	26.94
			Mean salary for librarians per minute	0.45
Average length of reference transaction in minutes	10		Estimated labor cost per reference transaction	4.49
Reference transactions per month	55		Estimated total compensation per reference transaction (with fringe benefits)	6.26
			Estimated total labor compensation per month	344.42
			Estimated total labor compensation per year	3,894.61
Number of committee/task force/work group meetings per year	3			
Average meeting attendance	4		Estimated total cost per year	8,417.89
Labor cost of meetings (assuming 1 hour meetings) per year	323.28			
			Estimated total cost per year with facility and administrative costs included	13,131.9

☑ Automatic recalculation

*The "Mean salary of librarians per hour is taken from Table 2-1 of the *National Compensation Survey: Occupational Wages in the United States, July 2002*, U.S. Department of Labor, Elaine L. Chao, Secretary, Bureau of Labor Statistics, Kathleen P. Utgoff, Commissioner. September 2003. Bulletin 2561. Available at: http://www.bls.gov/ncs/ocs/sp/ncbl0552.pdf (accessed November 6, 2003). This value was then adjusted from 2002 Dollars to 2003 dollars using the *Inflation Calculator* available at: http://www.bls.gov/ (accessed November 6, 2003).

Formulas used for calculations:

- "Reference transactions per month charged" equals the quantity,"Numbers of hours of service per week" times "Number of service point" times 60 minutes per hour times 52 weeks per year, end quantity, divided by the quantity, 12 months per year times "Average length of reference transaction in minutes," end quantity.
- "Labor cost of meetings (assuming 1 hour meetings) per year" equals the "Number of committee/task force/work group meetings per year" times the "Average meeting attendance" times the "Mean salary of librarians per hour."
- "Cost of software per year" equals the "Number of service points" times the "Cost of software per year per seat."
- "Cost of software per minute of service" equals the "Cost of software per year" divided by the quantity, 49 (assumes a 49 week year with 3 weeks of suspended service) times 60 times the "Number of service hours per week," end quantity.
- "Mean salary for librarians per minute" equals "Mean salary for librarians per hour" divided by 60.
- "Estimated labor cost per reference transaction" equals the "Average length of the reference transaction in minutes" times the "Mean salary for librarians per minute."
- "Estimated total compensation per reference transaction (with fringe benefits)" equals the "Estimated labor cost per reference transaction" plus the quantity, "Estimated labor cost per reference transaction" times 28.3 divided by 71.7, end quantity. Note that 28.3 divided by 71.7 is the ratio of benefits to wages and salaries. Both numbers were cited in *Employer Costs for Employee Compensation Summary* for June of 2003 available at: http://www.bls.gov/news.release/ecec.nr0.htm (accessed November 4, 2003).
- "Estimated total labor compensation per month" equals the "Reference transactions per month" times the "Estimated total compensation per reference transaction (with fringe benefits)."
- "Estimated total labor compensation per year" equals the "Estimated total labor compensation per month" times 12 months times 49 weeks divided by 52 weeks.
- "Estimated total cost per year" equals the "Labor cost of meetings (assuming 1 hour meetings) per year" plus the "Cost of software per year" plus the "Estimated total labor compensation per year."
- "Estimated total cost per year with facility and administrative costs included" reflects an additional 56 percent added on to "Estimated total cost per year."

REPORT: TEST SITE LIBRARIES

The executive summary, analysis, and recommendations from the final test site reports are provided following each library profile. The test evaluations were implemented by two experienced VRS Project trainers; work began on May 15, 2004 and final reports were submitted on July 30, 2004.

King County Law Library

Profile: The King County Law Library (special) is open to the public. The main library is located in the county courthouse in Seattle, with a branch in the Kent Regional Justice Center. The focus of the library's service is directed to the needs of the Court, Government Officials, Bar and residents of King County.   Potential service population: 1,758,000.

Member (with Elisabeth C. Miller Horticultural Library, Seattle Public Library, University of Washington Health Sciences Library, and Washington State Law Library), Sound Library Information Consortium, a collaborative chat and email reference service. VR Service application provider: QuestionPoint (OCLC). Hours of service: Monday – Friday, 10:00 a.m. to 4:00 p.m. (hours shared with WSLL).

Web site: http://www.kcll.org
Contact: Rita Kaiser, rita.kaiser@metrokc.gov

Pre-evaluation expectations:

- an opportunity to learn from the experts
- an opportunity to improve our service
- an opportunity to find out what's good about how we're doing virtual reference and what can be improved and how
- information about policies we should have that we don't now have
- suggestions for changing existing policies
- tips about improving our scripts

King County Library System

Profile: King County Library System (public) serves residents of King County outside the city of Seattle through 41 regional and branch libraries. Potential service population: 1,156,000. VR Service application providers: Tutor.com (chat and homework help); QuestionPoint (email). Hours of service: 24x7 (service provided by Tutor.com during library closed hours).

Web site: http://www.kcls.org
Contact: Barbara Pitney, bpitney@kcls.org

Pre-evaluation expectations:

- [Identify] difficulty of accessing service based on location of Ask A Librarian icon/button
- Info for better website design
- What policies I still need to develop
- What training issues present themselves through transcript analysis
- Ways to work with staff in order to implement either self-evaluation or peer review of transcripts
- Overall customer service impression of service
- Any additional comments or observations welcomed

Norwood Cole Library, Skagit Valley College

Profile: Skagit Valley College (academic) is part of the state system of community and technical colleges, located in Mount Vernon with three branch campuses on Whidbey Island and in Friday Harbor. The library partners with Grays Harbor College (Aberdeen) and area K-12 libraries (Anacortes, Sedro-Woolley, LaConner, Friday Harbor, Mount Vernon, and Aberdeen) to provide chat reference service. Potential service population: 180,000. VR Service application provider: VRLPlus (Docutek). Hours of service: Monday – Friday, 8:00 a.m. to 5:00 p.m.

Web site: http://library.skagit.edu
Contact: Gary Payne, payne@skagit.ctc.edu

Pre-evaluation expectations:

- We hope to learn about our quality of service
- Acceptance by college community
- Ease of use by students
- Feedback on our evaluation instrument
- Recommendations for marketing
- Assist in the development of a useful evaluation tool (VET)

Evaluation Report Template

[Name of Library]
Virtual Reference Service Evaluation Report

Executive Summary

This section should be limited to one printed page.

[Summarize each evaluation activity/tool results]

[Summarize report recommendations]

At the bottom of this page, insert this line:

Prepared by [name of evaluator/report writer], [Date]

Analysis of Evaluation Results

The number of pages in this section should approximate the number of evaluation activities/tools implemented in the process (i.e., four tools = four pages of analysis), including a page devoted to the on-site visit. For each tool, begin with a simple description of what you observed – good and bad. End with recommendations based on that tool or activity.

Include the beginning and ending dates of the evaluation, noting the date of the on-site visit.

Recommendations

This section should be two pages or less in length.

Recommendations must relate directly to the analysis of results. Include both suggestions for continuing successful practices and proposed service improvements and/or modifications.

Supporting Documents

This section should include one copy of all completed checklists, data summaries, survey reports, and other tools used/information collected in the evaluation process.

Sample Report

Virtual Reference Service Evaluation Report
Generic Public / Academic / Special Library
Anywhere, Washington

Executive Summary

VIRTUAL REFERENCE TRANSACTIONS
Transactions were exemplary – personal, helpful tone; effective reference interviewing; excellent information literacy and instructional practices; accurate, appropriate answers. Use of opening scripts could be improved.

WEB SITE EVALUATION
Generic Library has a good start on branding the service, but the use of the logo could be more effective and consistent. References to the name of the service are not standardized. Information provided to patrons is generally thorough and easy to find.

VIRTUAL REFERENCE POLICIES
Privacy Statement could be more thorough. Rules of Conduct are excellent but should be revised to include online behaviors. Policies should all be checked for date, authority, or method of revision

SITE VISIT
The Site Visit was a good opportunity to touch base with administrators and staff. Staff members were able to gain some insights into the process. Meeting the evaluators face-to-face may have helped "humanize" the process.

SUMMARY
Generic Library is providing excellent, professional, relevant reference services via virtual reference. Changes to the web site will make it even better. Transactions were exemplary – personal, helpful tone; effective reference interviewing; excellent information literacy and instructional practices; accurate, appropriate answers.

RECOMMENDATIONS
[These Recommendations are not consistent with the following report but are included to provide many examples of possible recommendations.]

- Greet the patron by name and consider using staff names or aliases.
- Improve sequence of scripts at the beginning of transactions.
- Clarify questions more consistently.
- Before closing, ask if patron has any further questions.
- Revise closing messages so that they are not repetitive.
- Create a closing script that thanks the patron and invites him or her back.
- Experiment with sending the Survey as a separate e-mail after the chat session has ended.

- Variety of “help” links needs to be simplified.
- Decide on a name for the service and use it consistently throughout.
- Eliminate all references to previous service name.
- Standardize references to the service throughout the page (“Ask Us Now”).
- Use the logo more visibly and consistently.
- Revise “Rules of Conduct” to include online behaviors.
- Add a disclaimer about legal and medical information
- Strengthen statement about staff qualifications and expertise.
- Check policies for date, authority, or method of revision.
- Review Privacy Statement for completeness

Prepared by Elsie Dewey and I. M. Booker, April 15, 2005.

Analysis of Evaluation Results

VIRTUAL REFERENCE TRANSACTIONS

Transactions were completed during the period February 1-- March 31, 2005.

The purpose of this tool is to provide an evaluation from the customer's perspective, based on random visits to the library's chat reference service.

Setting the Tone

Chat patrons are almost always greeted by name. Library staff providers consistently used a personal name to identify themselves and were ready to take questions. Opening scripts were sometimes awkward or confusing.

Getting the Question Straight

Questions were clarified with open and closed probes, and in cases where no clarification was offered, the question was interpreted correctly.

Keeping the Patron Informed

Experience varied. Sometimes pages were pushed without warning or explanation. Operators were usually very good at sending short updates on a search and keeping in touch.

Providing Information

All transactions provided correct and appropriate information. No referrals were necessary. These interactions were exemplary. Books, journal articles, reference books and newspapers were all recommended in one 12 minute interaction! The Information Literacy component of these transcripts is remarkable. One transcript gives 12 discrete instructions about how to search. The teaching style used here should be a model -- short, jargon-free instructions that gently "push" the patron into the correct database or resources.

Follow-Up

The evaluators were not usually asked whether they had additional questions, but were always thanked and encouraged to use the service again.

Comments:

The insertion of the lengthy script aimed at students was sometimes used inappropriately. Handling these issues in the reference interview would be more effective. Two different surveys were received with one transcript. Also, each transcript ends with an odd sentence: "We have received your question and will try to respond within one business day."

WEB SITE EVALUATION

Conducted during February, 2005

The purpose of this tool is to evaluate usability, clarity and navigation, based on a review of the library's web site.

Branding

The "Ask Us Now" brand is descriptive and memorable, but vestiges of an earlier brand name remain and should be eliminated. The primary links to the service are consistent throughout, but could be more visible. In addition, different wording ("Ask Us") appears in the link from catalog pages. Wording on these links should be standardized.

Accessibility

The variety of "help" links on the header is confusing. Each of these four links goes to a different page. Beyond that, individual pages are easy to understand and require minimal scrolling. Information about service availability and restrictions are found in the "Ask Us Now" FAQ. Hours given in the FAQ are incorrect. Technology requirements are minimal. In addition, access is enhanced by the provision of a less robust version of the software for users with technical limitations.

Scope of Service

The "Ask Us Now" FAQs are good, clear, jargon-free descriptions. There are no legal or medical disclaimers. Generic Library might consider adding brief statements about willingness to demonstrate databases, the general quality/reliability of the subscription databases, and qualifications of in-house service providers.

Confidentiality and Data Gathered

Generic Library covers the issues of confidentiality thoroughly and clearly in easy to find statements. Anonymity is not possible due to the library card requirement.

Comments

The four "Help" links should be renamed and made more distinct or combined into one or two Help areas. Link to "uninstall" instructions is broken.

Disclaimers about ability to provide legal or medical advice should be added.

FAQ files are particularly good. Very thorough, easy-to-understand statements

VIRTUAL REFERENCE POLICIES

Reviewed in February 2005

The purpose of this tool is to check for the presence and clarity of policies related to Virtual Reference.

All of the policies examined were available on the web. There were no formally organized print policies, other than copies of the online policies.

Privacy Statements

The Privacy Statement is generally very good and easy to understand. However, it does not address every criterion of the VET checklist. Generic Library might review the checklist to see if other elements could be added. No date, authority, or method of revision is given.

Rules of Conduct

The “About Ask Us Now” page includes a link to the Generic Library Rules of Conduct. This is a well-defined policy, gives good examples, date and authority. It does not, however, specifically cover online behaviors.

Service Overview for Users

Almost every criterion on the VET Checklist is covered. Statements could be added about staff qualifications and document delivery options.

Staff Guidelines

These are based on Generic Library’s “Information Service Policy.” This policy mentions only telephone and in-person service. Service expectations are covered in the Mission statement -- very well done, but won’t be seen by anyone using Virtual Reference services.

Comments

Rules of Conduct for patrons – in person, on the phone, and online – would be a good addition to the web site. Policies should all be checked for date, authority, or method of revision. Overall, these policies are clear, consistent and well-related to one another. Elements of the Privacy Statement could be slightly more comprehensive.

SITE VISIT
Date: Tuesday March 5, 2004 1pm

[Note: All names are fictitious.
We began our visit by meeting with Sue Moore, the head of Reference Services and Bob Microserf, Manager of Virtual Reference Services. After initial introductions, Elsie [evaluator] described her preparation for this project by evaluating her own institution's Web Site and her own 6 most recent transcripts as a virtual librarian using the VET checklists.

We learned that staff had been notified that secret patron activities were being carried out and had been reminded by e-mail. We let Sue and Bob know that we would lead off our meeting with staff with positive comments about our experiences using their services.

Then we shared our findings so far. Thorough descriptions of our findings via each tool are included above.

- Virtual Reference Transaction Checklist: We discussed our perceptions of our VR interactions. Not all of the checklists were completed, since we had not received transcripts for some interactions. Bob was able to provide these during the visit.
- Web Site Evaluation Checklist: We left a copy of our preliminary finding since Bob and Sue were interested in fixing the minor flaws (broken links) and in our perceptions of navigation issues of the site.
- Virtual Reference Policy Checklist. No printed policies were examined during the on-site visit. We had not yet completed the Policy Checklist before our on-site visit, so we couldn't really discuss it, other than what we had noticed while using the service and completing the web site evaluation. There were relevant written policies for us to examine.

We let Sue and Bob know that we expected to complete the report sometime in April and that a follow-up questionnaire would be sent 3 months later. We reviewed our agenda for the staff meeting to follow and expressed appreciation for their participation in the project.

We then met with three staffers from the "Ask Us Now" service. We repeated introductions, qualifications, and shared Anne's "self-evaluation" exercise. We described the VET process, what we had completed to date, what remained to be done, and distributed copies of the checklists. Staff members were interested in the Virtual Transaction Checklists and how they had "scored." We reassured them that they were doing a fine job and that we were impressed with the reference service we had received. We asked the staff to tell us about their VR experience. We noted that while they enjoy the process and believe it to be a valuable reference tool, covering CHAT while working with the public in person can be challenging. We ended by expressing our appreciation for their time and for their participation in the project.

RECOMMENDATIONS

[These Recommendations are not consistent with the preceding report but are included to provide many examples of possible recommendations.]

VIRTUAL REFERENCE TRANSACTIONS

- Greet the patron by name and consider using staff names or aliases.
- Improve sequence of scripts at the beginning of transactions.
- Clarify questions more consistently.
- Before closing, ask if patron has any further questions.
- Revise closing messages so that they are not repetitive.
- Create a closing script that thanks the patron and invites him or her back.
- Experiment with sending the Survey as a separate e-mail after the chat session has ended.

WEB SITE EVALUATION

- Variety of "help" links needs to be simplified.
- Decide on a name for the service and use it consistently throughout.
- Eliminate all references to previous service name.
- Standardize references to the service throughout the page ("Ask Us Now").
- Use the logo more visibly and consistently.

VIRTUAL REFERENCE POLICIES

- Revise "Rules of Conduct" to include online behaviors.
- Add a disclaimer about legal and medical information
- Strengthen statement about staff qualifications and expertise.
- Check policies for date, authority, or method of revision.
- Review Privacy Statement for completeness.

FOLLOW-UP

Purpose: Learning from the information produced by the evaluation process requires that the final report be reviewed after a specified time period in order to determine whether modifications recommended by the results were implemented and if so, whether they improved service.

Method:

Distribute a questionnaire (sample follows) to staff members who received the initial evaluation report. Include a copy of the evaluation report so that they can readily compare the initial recommendations with any relevant service changes that may have been implemented. A copy of the completed questionnaire should be shared with the original evaluators for their observations.

The results of the follow-up questionnaire and additional comments on the evaluation process used with test site libraries in summer 2004 will not be available until early 2005. A summary will be added to this document at that time.

VIRTUAL EVALUATION TOOLKIT
FOLLOW-UP QUESTIONNAIRE

Library____

Date____

Please score the tools used in evaluating your Virtual Reference Service according to this scale:

1 = Strongly Disagree **5 = Strongly Agree**

VIRTUAL REFERENCE TRANSACTION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified characteristics of live chat sessions that my library considers important					
The results provided by the evaluation were clear and logical					
The evaluators' comments were useful					
My library made changes to the VR service based on the results and/or comments					
If changes were made, what were they?					

WEB SITE EVALUATION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified Web site features and characteristics that my library considers important					
The results provided by the evaluation were clear and logical					
The evaluators' comments were useful					
My library made changes to the Web site based on the results and/or comments					
If changes were made, what were they?					

VIRTUAL REFERENCE POLICY CHECKLIST	1	2	3	4	5
The checklist identified policy considerations for virtual reference service that my library considers important					
The results provided by the evaluation were clear and logical					
The evaluators' comments were useful					
My library made changes to our policies based on the results and/or comments					
If changes were made, what were they?					

Please indicate the source of your Virtual Reference user survey:
☐ Supplied by software vendor, not customized
☐ Supplied by software vendor, locally customized
☐ Developed by my library

SURVEY RESULTS	1	2	3	4	5
Survey questions are appropriate for my library and community					
The results provided by the evaluation were clear and logical					
The evaluators' comments were useful					
My library made changes to the VR service based on the survey results and/or comments					
If changes were made, what were they?					

Please rate the overall quality of the VET process:

	1	2	3	4	5
The final report was clear and thorough.					
The documents provided were appropriate and sufficient					
The report was useful.					
The evaluators were knowledgeable and skilled.					
The evaluators' comments and recommendations were useful.					

What did you like best about VET?

What did you like least about VET?

Do you have recommendations for modification or changes to VET?
(Please use additional sheets of paper if necessary.)

VIRTUAL EVALUATION TOOLKIT
FOLLOW-UP QUESTIONNAIRE

Library Z

Name/Title of person completing form

Date October 2004

Please score the tools used in evaluating your Virtual Reference Service according to this scale:

1 = Strongly Disagree 5 = Strongly Agree

VIRTUAL REFERENCE TRANSACTION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified characteristics of live chat sessions that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to the VR service based on the results and/or comments	☐	☐	☐	☐	☒

If changes were made, what were they? During 2004 our live chat service transitioned from being staffed by paraprofessionals to our professional staff and was reassigned to another department. My responsibilities are now limited to reviewing daily activity reports as well as looking at a number of transcripts including individual sessions based on comments received from patrons completing our exit survey form. The departmental reorganization still enables me to work with a designated staff trainer who is also a service provider. Since he is a service provider as well as a peer, he does most of his training as part of regularly scheduled staff meetings. (He is the only staff member to have taken the Anytime, Anywhere Answers VRS training curriculum.) This limits the need to address performance issues on an individual basis, which would be outside his purview. He continues to remind staff of the importance of asking clarifying questions as well as asking callers if they have any other questions before ending a session. Based on the VET feedback, we have created several scripted messages that help staff with the clarification process as well as asking a caller if he/she has any other informational needs before ending a session. Transcripts show we now have better follow through on clarifying a caller's question as well as how we end a session. Obviously, some staff are more comfortable in a chat environment than others so performance issues still exist. The evaluators also conducted several sessions with our after-hours service and gave them very high marks.

The Evaluation Report was framed in very positive tones and complimented the service being provided to our patrons. The evaluators started the staff session on a very upbeat and positive noted which helped ease some staff apprehensions about why they were selected to be interviewed about the VET process.

WEB SITE EVALUATION CHECKLIST	1	2	3	4	5
The checklist identified Web site features and characteristics that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators’ comments were useful	☐	☐	☐	☐	☒
My library made changes to the Web site based on the results and/or comments	☐	☐	☐	☐	☒

If changes were made, what were they? Our service changed its name 3 times in 4 years. The VET process identified the fact that we had embedded into scripts, our Web pages and on the vendor end all three names, which proved to be confusing to our evaluators. I had to work with both our vendor and our Web Service Department in order to identify where all the names were located and then to have them changed to Ask A Librarian. We also had to locate all scripts containing outdated names and revise them. This applied to in-house scripts as well as scripts used by our after-hours service provider.

Several sections of our About Live Chat were reworded based on suggestions supplied by the VET evaluators. In addition our By Online Chat column on our Picker Page of services was revised to highlight the fact our service was open 24/7. We eliminated the list of hours library staff provided the service vs. our after-hours service. We opted instead for a more generic statement …
“Service is staffed by professional librarians who are available to answer your questions.”

The VET evaluators recommended changing the sequencing of our opening scripts. This is a vendor related issue and is outside our purview. Each vendor has their own sequencing of welcoming scripts. The evaluators may have been indicating their personal preference when they encountered our opening sequence.

As part of a promotional effort, our live chat service had a very visible presence on our Home Page. We had a logo as well as two separate tag lines, which was located immediately under our banner. We occupied this prime Home Page real estate for a year. The VET evaluation took place during this period. Two months after the VET team reviewed our site our service access became one of 5 yellow buttons at the top of our Home Page due to a website redesign. I’m now tracking our service activity to determine the effect of this change in service visibility. This change was made by our Web Services Department prior to receipt of the VET Evaluation Report.

1 = Strongly Disagree   5 = Strongly Agree

VIRTUAL REFERENCE POLICY CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified policy considerations for virtual reference service that my library considers important	☐	☐	☒	☐	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☒	☐
My library made changes to our policies based on the results and/or comments	☒	☐	☐	☐	☐

If changes were made, what were they? When presented with the section on Policy Recommendation, Administration proved to be somewhat resistant since they perceived that outsiders were dictating policy changes. My suggestion is to rename this section, which may also be a flash point at other institutions. Policy Observations may be more appropriate.

Based on the number of abusive, rude, and prank type calls being received by our live chat service, Administration was asked to amend its Rules of Conduct prior to our VET evaluation process to better handle behavioral issues being experienced by our live chat service providers. After consultation with the System's attorney, it was decided that our existing Rules of Conduct for in-library patrons was broad enough to cover our live chat cliental.

As a result of this determination by Administration, staff was, nevertheless, able to develop a set of internal working procedures to follow when confronted with inappropriate online chat behavior. These procedures mimic to some degree our existing Rules of Conduct for in-library patron behavior; however, it's hard to call the police on a live chat patron! Since these procedures are considered an internal document they do not appear on our About Live Chat pages. The decision not to publish internal procedures on our About Live Chat page reflects our institutional philosophy and climate.

Our internal procedures are as follows … First, it should be noted that we offer an authenticated online chat service to system cardholders. We currently have an authentication system in place that is based on an algorithm formula, which is not 100% successful. So, second, staff needs to validate card numbers against our existing patron database. This will become an automatic process when we change to a new circulation system since we'll be using Web Access Management (WAM) software to authenticate card numbers against our patron database. Patrons will be required to enter their card number and PIN before receiving our live chat login page. Third, inappropriate behavior will cause staff to send a scripted warning message to the patron. Continued behavior (either that day or several days later) will cause staff to send a second and even a third scripted warning message to the patron. Each of these warning messages informs the patron they will be "trespassed" from our live chat service for up to 30 days if they continue exhibiting inappropriate behavior. Fourth, when a caller is "trespassed" by the manager of the service a note is added to the patron's card with an expiration date for un-blocking the card. This message does not block the patron from checking materials out…just from using our live chat service. At this point in time, a manual record of card numbers/patrons trespassed is kept on a whiteboard. Fifth, we have established an informal 3 call per day limit on our live chat service. (This mimics our phone service limit, which again is an internal policy.) We institute the 3-call limit on callers who repeatedly abuse the service (mostly after school pranksters) by noting their card number and screen name on a whiteboard. A scripted message is then sent to the patron indicating they are limited to 3 calls per day and will be "trespassed" if they continue their harassing behavior.

The wording of one policy recommendation by the evaluators is too broad in scope … “Examine all online policies for authority, method or revision, and date” … for it to related to just our live chat service. Our About Live Chat pages link to other policy statements about privacy, rules of conduct, technical support and even to our email service. Many of these pages are under the jurisdiction of other departments and reflect our institutional culture. Again, the phrasing used by the evaluators in making policy recommendations needs to be carefully considered since they may impact the perceived philosophical culture of the parent institution. This may especially be the case if the evaluators are perceived to come from a competitive institution or service with a bias toward “their own way of doing things.” As part of our About Live Chat page, we have embedded links to our email and phone services should patrons having questions or concerns about privacy, how live chat works, professional qualifications of staff, software requirements or technical problems. We have let to receive a single inquiry relating to privacy or staff qualifications since the service was instituted in 2000. The question that may need to be asked is … “Are patrons concerned about privacy and staff qualifications?”

Please indicate the source of your Virtual Reference user survey:
☐ **Supplied by software vendor, not customized**
☐ **Supplied by software vendor, locally customized**
☒ **Developed by my library**

SURVEY RESULTS	**1**	**2**	**3**	**4**	**5**
Survey questions are appropriate for my library and community	☐	☐	☐	☐	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☐
The evaluators’ comments were useful	☐	☐	☐	☐	☐
My library made changes to the VR service based on the survey results and/or comments	☐	☐	☐	☐	☐
If changes were made, what were they? Evaluators need to remove their popup blocker software prior to starting a session so they can receive an institution’s exit survey. Evaluators also need to make arrangements in advance to determine if the service may have any special authentication requirements. Evaluators should reconfirm their on-site visit appointment time to avoid any ambiguity issues. Neither evaluator commented on our exit survey though they were supplied with 3 months worth of statistical data. One evaluator completed one or more exit surveys but I found no reference to the appropriateness of our questions in the Report, therefore, I'm unable to rank the above questions.					

Please rate the overall quality of the VET process:

	1	2	3	4	5
The final report was clear and thorough.	☐	☐	☐	☒	☐
The documents provided were appropriate and sufficient	☐	☐	☐	☒	☐
The report was useful.	☐	☐	☐	☒	☐
The evaluators were knowledgeable and skilled.	☐	☐	☐	☐	☒
The evaluators' comments and recommendations were useful.	☐	☐	☐	☒	☐

What did you like best about VET? The Report highlighted several changes that I knew had to be made but I never dealt with them until they were mentioned in the document.

What did you like least about VET? I had to deal with the unexpected situation of having to "sell" several policy recommendations to Administration. Dealing with the realization that the evaluators came from different political climates and that the report was interpreted from a number of different viewpoints which required defending as well as selling our live chat service once again to Administration.

Do you have recommendations for modification or changes to VET? Change the word "Recommendations" to "Observations". Instead of using the word "Policy" consider using "Guidelines" or "Procedures" since there may be political implications attached to the word "policy". Since survey results were not addressed, should this section be dropped?

VIRTUAL EVALUATION TOOLKIT
FOLLOW-UP QUESTIONNAIRE

Library A

Name/Title of person completing form

Date October 04

Please score the tools used in evaluating your Virtual Reference Service according to this scale:

1 = Strongly Disagree   5 = Strongly Agree

VIRTUAL REFERENCE TRANSACTION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified characteristics of live chat sessions that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to the VR service based on the results and/or comments	☐	☐	☐	☐	☒
If changes were made, what were they? We made changes to our scripts, and to opening and closing statements .					

WEB SITE EVALUATION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified Web site features and characteristics that my library considers important	☐	☐	☒	☐	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☒	☐
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to the Web site based on the results and/or comments	☐	☐	☐	☒	☐
If changes were made, what were they? We fixed links that didn't work, added links to policies like our privacy polciy and added adoption dates to the policies that we posted on our site. We reviewed the general arrangment of information presented on our site. We decided not to make changes yet as the site had just been substantially remodeled.					

1 = Strongly Disagree 5 = Strongly Agree

VIRTUAL REFERENCE POLICY CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified policy considerations for virtual reference service that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to our policies based on the results and/or comments	☐	☐	☐	☒	☐
If changes were made, what were they? We provided better links and enactment dates to the policies that appear on our web site. We revised our legal information service policy to include email and chat services. We reviewed other policies and determined that we will complete a systematic review of existing policies when we've recovered from our move back to the Courthouse.					

Please indicate the source of your Virtual Reference user survey:

☐ **Supplied by software vendor, not customized**
☐ **Supplied by software vendor, locally customized**
☐ **Developed by my library**

SURVEY RESULTS	**1**	**2**	**3**	**4**	**5**
Survey questions are appropriate for my library and community	☐	☐	☐	☒	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☐
The evaluators' comments were useful	☐	☐	☐	☐	☐
My library made changes to the VR service based on the survey results and/or comments	☐	☐	☐	☐	☐
If changes were made, what were they? The survey questions we used were designed as in collaboration with our LSTA grant partners. The evaluation did not address the responses to these surveys. We've only seen the responses once during the course of the grant and would have benefited from a more regular feedback on the survey results.					

Please rate the overall quality of the VET process:

	1	**2**	**3**	**4**	**5**
The final report was clear and thorough.	☐	☐	☐	☐	☒
The documents provided were appropriate and sufficient	☐	☐	☐	☐	☒
The report was useful.	☐	☐	☐	☐	☒
The evaluators were knowledgeable and skilled.	☐	☐	☐	☐	☒
The evaluators' comments and recommendations were useful.	☐	☐	☐	☐	☒

What did you like best about VET? It was extremely helpful to have an outsiders' perspective on how we provide our service.

What did you like least about VET? It wasn't clear for the outset that full staff participation was a part of the process. We'd have prepared all of our staff for their interview with the evaluators in advance to make maximum use of this opportunity if we'd realized that the evaluators wished to meet with all who provide this service

Do you have recommendations for modification or changes to VET? Overall, this was a very positive experience for our staff. The evaluators were articulate and thorough. A little more detail about what would be happening during the course of the evaluation might be helpful for others who use this model in the future.

VIRTUAL EVALUATION TOOLKIT
FOLLOW-UP QUESTIONNAIRE

Library M

Name/Title of person completing form

Date October 2004

Please score the tools used in evaluating your Virtual Reference Service according to this scale:

1 = Strongly Disagree 5 = Strongly Agree

VIRTUAL REFERENCE TRANSACTION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified characteristics of live chat sessions that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to the VR service based on the results and/or comments	☐	☐	☒	☐	☐
If changes were made, what were they? Not yet implemented this year. Additions/changes to scripts; additional policies are likely. Good feedback on greeting and closing.					

WEB SITE EVALUATION CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified Web site features and characteristics that my library considers important	☐	☐	☐	☐	☒
The results provided by the evaluation were clear and logical	☐	☐	☐	☐	☒
The evaluators' comments were useful	☐	☐	☐	☐	☒
My library made changes to the Web site based on the results and/or comments	☐	☐	☒	☐	☐
If changes were made, what were they? Changes not yet implemented this year. We plan to have our website evaluated by students for navigability. Also have discussed ADA compliance.					

1 = Strongly Disagree 5 = Strongly Agree

VIRTUAL REFERENCE POLICY CHECKLIST	**1**	**2**	**3**	**4**	**5**
The checklist identified policy considerations for virtual reference service that my library considers important	☐	☐	☐	☒	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☒	☐
The evaluators' comments were useful	☐	☐	☐	☒	☐
My library made changes to our policies based on the results and/or comments	☐	☐	☒	☐	☐
If changes were made, what were they? We haven't addressed this yet. I think this section will take considerable discussion. However, the feedback from the VET is very helpful in giving us a standard against which to measure.					

Please indicate the source of your Virtual Reference user survey:
☐ **Supplied by software vendor, not customized**
☒ **Supplied by software vendor, locally customized**
☐ **Developed by my library**

SURVEY RESULTS	**1**	**2**	**3**	**4**	**5**
Survey questions are appropriate for my library and community	☐	☐	☐	☒	☐
The results provided by the evaluation were clear and logical	☐	☐	☐	☒	☐
The evaluators' comments were useful	☐	☐	☐	☒	☐
My library made changes to the VR service based on the survey results and/or comments	☐	☐	☐	☒	☐
If changes were made, what were they? Most users were very positive. Eighty-seven percent felt their question was answered. Ninety-one percent found it easy to use. Ninety-four percent would use it again. The complaints were mostly the slowness to load and no one on duty. Most responded that it was a great service. We were able to bring our own server online this past summer so we hope that the response time will now be faster.					

Please rate the overall quality of the VET process:

	1	**2**	**3**	**4**	**5**
The final report was clear and thorough.	☐	☐	☐	☐	☒
The documents provided were appropriate and sufficient	☐	☐	☐	☐	☒
The report was useful.	☐	☐	☐	☐	☒
The evaluators were knowledgeable and skilled.	☐	☐	☐	☐	☒
The evaluators' comments and recommendations were useful.	☐	☐	☐	☐	☒

What did you like best about VET? The face-to-face feedback on the transactions was the most useful and fun.

What did you like least about VET? Some of the feedback on the checklists is very brief.

Do you have recommendations for modification or changes to VET? I think this is a very useful tool. In combination with user surveys, libraries should have a good picture of their VR services.

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APPENDIX: Question Scenarios Used for Test Evaluations

ACADEMIC QUESTION SCENARIOS
FOR VET TRANSACTION EVALUATION

1. You are: A community college student enrolled in an introductory science class. You are a first-time college library user with little prior library experience of any kind.

   Question: Where can I find books regarding Wyoming earthquakes?
   Follow up: Or how can I find information in libraries?

2. You are: Same as question 1.

   Question: I'd like to find some articles on Community Supported Agriculture. How can I find them?
   Follow up: I'm just supposed to do a research project on this subject, that's all I know.

3. You are: A part-time community college instructor teaching a nursing class.

   Question: Where can I get a summary on the article printed January 23 2004 in science mag. The Article is titled BAR Domains as Senors of Membrance Curvature: The Amphiphysin BAR Structure.
   Follow up: Are there any more articles on BAR domains?

4. You are: A second-year community college student and serious chocoholic who is trying to settle an argument with friends.

   Question: I am looking for studies on chocolate and health. Is chocolate bad for your health?
   Follow up: I'm hoping to find some proof that it might not be as bad as people think.

5. You are: A student taking an advanced economics class. You are a military dependent who recently returned from living in Germany and still have great interest in Europe.

   Question: How would I find the annual revenue of a company whose parent is Belgium (traded on the Brussels Stock Exchange) but that also operates in the US, and in Washington State?
   Follow up: Are there annual reports available online?

6. You are: A second-year student in a Political Science class who has been accepted at the University of Washington next fall. You are interested in a career in journalism.

   Question: Do you have any information on freedom in Iraq?
   Follow up: How the people of Iraq feel about the concept of freedom, the history of freedom in Iraqi society, whether this is being imposed on them or if they have a tradition of freedom, etc.

7. You are: A remedial English student trying to complete an assignment at the last minute.

   Question: I am having some problems finding journal articles about the topic: traffic in the Puget Sound region. Could you please help me?
   Follow up: I need 2 journal articles.

8. You are: A student taking a social science course. You are thinking about becoming a travel agent and trying to pick a report topic that will interest you.

   Question: Could you tell me how to get statistics on the number of tourists per year visiting Seattle between the years 1992 to 2002?
   Follow up: This is for a school project. Thank you.

9. You are: An African-American student who read an alarming article in the *Seattle Times* about the high school dropout rate.

   Question: I just heard a statistics that says that half of the students of color in Seattle Public Schools doesn't graduate and I was wondering where I can look to research whether that is an accurate statistic.
   Follow up: I was trying to find information that disproved what I heard…

10. You are: An English instructor teaching a distance learning class.

    Question: Are there any journals or books written about postmodernism and black/african roots?
    Follow up:

11. You are: A student who recently visited the Chicago Art Institute and was very taken with *The Millinery Shop*, a work by Degas.

    Question: I am doing a paper on Edgar Degas. I was wondering if you have any books on his works and life? Any information related to him would be greatly appreciated!
    Follow up: Is there information on why he painted so many ballet scenes?

12. You are: A practical nursing student enrolled in an ethics class.

    Question: I want to find out the historical account of proposed rcw 70.122.100 on Mercy killing or Physician assisted suicide.
    Follow up: How many states have laws on mercy killing?

LEGAL QUESTION SCENARIOS
FOR VET TRANSACTION EVALUATION

1. You are: A sixty-ish woman who is being awakened on a regular basis by crowing in a neighbor's back yard.

   Question: Are there regulations about having chickens in Seattle?
   Follow up: Mainly I want to know if in residential areas chickens are about roosters.

2. You are: A small business owner who attended a City Council meeting, read quotes in a newspaper report of the meeting the next day, and believes that the written account may be inaccurate.

   Question: Where can I find Attorney General's explanations of ambiguous laws?
   Follow up: I'm looking for a definition of "minutes" in regard to cities and towns. Mayor says they are just "notes" until accepted.

3. You are: A female hotel clerk with teenaged children who is taking care of her sister's 13-year old daughter while the sister is in jail. Her 19-year old daughter told her that the niece is sexually active and may have a venereal disease.

   Question: Hello. I am looking for the medical consent laws concerning adolescents care and treatment.
   Follow up: Is the role of an aunt covered?

4. You are: An unemployed 50-year old bank cashier whose husband recently was convicted of writing bad checks on your join checking account in a credit union associated with his job. You're worried that you won't be hired if a potential employer learns about it.

   Question: I'm having trouble finding the Washington law concerning sealing of records.
   Follow up: Is there a place that defines legal terms in language I can understand?

5. You are: A single father whose 5-year old fell from an apartment balcony and suffered brain damage. The prognosis is cautiously optimistic, but she will require long-term care.

   Question: Where can I find information about the Washington state law that allows a parent to care for a sick or injured child and use their own sick pay benefits from their employer?
   Follow up: How do I contact the state Attorney General's office?

6. You are: A college junior who left his ancient Chevy clunker on the side of the road after being side-swiped and found it had been towed when he returned to retrieve it three days later. You're broke and worried.

   Question: What is the penalty for abandoning a car in this state??
   Follow up: If a vehicle owner has full coverage insurance and the insurance company chooses to leave a vehicle in a tow storage lot, are they liable????

7. You are: A handgun collector who read a classified advertisement in a trade magazine offering a Ruger GP100 and silencer for sale.

   Question: Can I have a gun suppression device in Washington?
   Follow up: Are there rules about where I can keep it?

8. You are: A yacht broker who sells new and used boats. You act as middle man between buyer and seller, but do not hold boats in inventory.

   Question: I work at a place that sells yachts. What is the law regarding a bank trust account?
   Follow up: I'm concerned about customer's deposits.

9. You are: The parent of a 16-year old girl who reported that her Choir instructor required all members to participate in the annual Spring Pageant (Easter time), which is held at morning Assembly (during school hours). She is "pretty sure" that one of the songs was a hymn. Your family is agnostic and you are concerned about religious activities in public schools.

   Question: I wanted to know where I can find laws about High School Music teachers requiring their students to sing religious songs in public schools.
   Follow up: Is there a source that identifies songs as hymns? That is, is there a way to tell whether "Abide with Me" is a religious tune?

10. You are: A devotee of "America's Most Wanted" whose curiosity was piqued by a recent program that described an elaborate bank robbery in another state.

    Question: I was told that there is a special enhancement for criminal charges (WA, State Law) if the suspect was wearing body armor at the time the crime was committed. But I have been unable to find any such information.
    Follow up: I don't know if it is charge specific but I expect it would be if it exists.

11. You are: A second-year community college student completing an assignment for a criminal justice class.

    Question: Is it a crime to eat human flesh in Washington State?
    Follow up: Don't worry, this is extra credit for a CJ class at BCC.

12. You are: A 30-year old subscriber to the *Seattle Times* who is confused by the many articles that refer to "public servants." People of this description seem to work in many different jobs and agencies, as well as at many different levels of authority. Your own employment history has been as a retail clerk in a variety of stores, such as Sears, WalMart, and Fred Meyer.

    Question: How do I find information and requirements for being designated a public servant?
    Follow up: Any information you can provide will be greatly appreciated. Thank you.

13. You are: A high school dropout whose cousin is in and out of jail. You and other friends have been discussing the many stories you've heard about his and others' experiences behind bars. You've recently discovered the public Internet terminal at a Seattle Public Library branch and decide to try "Live Help."

    Question: I am trying to find the information on the grandfather clause. I was also told that the code im looking for is 450.700 or 450.750. The reason why im looking for this is I have a friend in a correctional institution and they had taken his coat away from him when it was already approved over a year ago but someone else is trying to take it away. So I do know this is under the grandfather cause.
    Follow up: I would appreciate do much if you could help me out so I could find this on the internet if possible. Im new at this so I could use all the help you could give.

14. You are: A claims processor at Safeco Insurance. A co-worker routinely utters obscenities in the office—loudly—and you and your colleagues are discussing ways to curb his behavior, since personal pleas have not worked.

    Question: We currently have a debate going in my office of whether or not ther is a law about profanity in the RCW. Could you please help me clear this up?
    Follow up: Do sexual harassment rules cover the use of obscenities?

PUBLIC LIBRARY QUESTION SCENARIOS FOR VET TRANSACTION EVALUATION

1. You are: A second-year student at a college that focuses on natural medicine.

   Question: I am looking for statistics on the number of acres of cropland are lost in the United States each year due to development, use of pesticides, erosion and other environmental threats.
   Follow up: Overall, how many acres are lost per year? Or even in the last 20 years, how much has been lost?

2. You are: An inquisitive teenager that just returned from a trip to Europe with his parents. He celebrated his sixteenth birthday during a visit to Cologne.

   Question: what do the three 'x's', signify on the amsterdam, holland, streetpost? they have these 'post', the size of an american fire hydrant; with three 'x''s, written on them, what do they mean?
   Follow up: where do the candles significance on the birthday cake come from?, germany?

3. You are: The mother of a twenty-four year old man who has been diagnosed with osteosarcoma, a form of bone cancer. At a recent bible study meeting, someone mentioned an herbal treatment, but all you remember is the name.

   Question: Information about herbal therapy for cancer (which type unspecified) named something like 'omni koresh' or 'omni karesh'.
   Follow up:

4. You are: A retired bus driver writing an article about life in America immediately after World War II for the AARP magazine. You are looking for photographs, but have heard that you can get in trouble using pictures from books and newspapers.

   Question: I was looking for royalty free images of women in the 1940's. I've checked the library of congress site and the popular image websites such as imagebank and corbis. Does the library have any sort of resourse for Royalty free images. thank you
   Follow up:

5. You are: A free-lance writer fishing for ideas.

   Question: I need a listing of the state prisons death row inmates Where do I find one
   Follow up: Also, I need a listing of the security guard agencies operating for KBR in iraq. Do you have one?

6. You are: A married man with two children who has been accused of fathering the child of an ex-girlfriend. Your wife is on your case, and you're desperate for help. A friend told you about a possible support group.

   Question: I am looking for an advocacy program for fathers related to alleged paternity suits.
   Follow up: I think it was in the Smith Tower at one time but it has moved. The name I think was Fathers Advocacy.

7. You are: A fifty-year old woman who is dealing with her parents' estate. Some of the furniture has sentimental value, especially the family piano. You took lessons briefly in sixth grade. You are very polite and grateful.

   Question: Do you have any information on "W. S. Bassindale Co. Tacoma Wash."
   Follow up: I have an old upright piano with the above inscription painted on the front and inside of the piano. I am trying to track down its history and cannot find anything on it.

8. You are: A young man who will graduate from high school in June. You're researching careers and were intrigued by a recent TV program.

   Question: I am trying to find a mortuary college in California. Google searches for "mortuary college california" have proved unsuccessful.
   Follow up: I know there is at least one because I saw a television program showing how interns lived above the mortuary and were on call 24/7 and it was in San Francisco.

9. You are: A community college student in practical nursing. You're working on an assignment for a course titled "Applying the Nursing Process in Societal Health Issues."

   Question: I need to know how many Catholic healthcare facilities there are in Washington State (ie hospitals, hospices, home health etc). Thanks!
   Follow up: How does the church decide where to locate or sponsor such facilities?

10. You are: A UW graduate student who acts as a teaching assistant for an introductory class in anthropology.

    Question: I was wondering about the origin of the phrase "at 50 paces." A student asked me what it meant when I used it. I know it means that you can recognize something easily, but the origins of the phrase are less clear. Duels or archery contests come to mind.
    Follow up: Didn't William Tell shoot an apple off his son's head at 50 paces?

11. You are: An African-American photographer who specializes in pictures of working women. You have just been invited to exhibit your work at a private college in New York City in September.

    Question: Where can I learn of monthly periodicals in New York City to which I can send my PR? I'm hosting an event in NYC that will be of interest to the general public and associations of women, people of color, and labor.
    Follow up: Google hasn't provided much help.

12. You are: A thirty-four year old woman whose mother just died. Your family had a summer cabin in the Olympia area, and you found letters from her to an old family friend that indicate

she gave birth to a child there, but never told you about. The letters lead you to believe that the baby didn't live.

Question: I would like to know how I might be able to find some information on a death back in 1967 or 1968. If the information was ever recorded or what. Can you help?
Follow up: this would have been a still born which would have been my sister.

13. You are: An Army officer who is about to be transferred overseas. You are weeding your belongings to minimize the amount of goods that will be put in storage, and finally got around to examining the contents of a big box of papers and photos that your grandmother sent you two years ago.

    Question: I am looking for some historical information on the Honey corn Confection corporation 1938.
    Follow up: I found a stock certificate of my great uncles and would like to find some info on it.

14. You are: A Department of Health employee that is helping an individual in Clark County complete a public disclosure request.

    Question: Do you know if there is any information about a polio outbreak in the 1950's in Clark County that closed the Vancouver High School for several years?
    Follow up: Is there a way to get information from you without the person coming in to the library?

15. You are: A health- and safety-conscious young mother who was terrified by the Mad Cow Disease reports. You have been feeding your husband and ten-year old son nothing but chicken for months and they're begging for steak and hamburgers.

    Question: Is it safe to eat beef again?
    Follow up: Are there any safety regulations about labeling meat?

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