April 26, 2011

Introduction

In October 2010, Mary Fetzer, Interim Associate University Librarian for Research and Instructional Services (RIS), after consultation with the User Services Council, charged a Chat Reference Services Task Force to analyze the current Meebo service and make recommendations regarding all aspects of chat virtual reference at RUL. The task force focused mainly on analysis of available software options and discussions of librarian staffing of the service (in terms of personnel and hours). This report details the recommendations of the Chat Reference Services Task Force for continuation of this popular virtual reference service at RUL.

Members of the task force are: Katie Anderson, Natalie Borisovets, Melissa Gasparotto, Marty Kesselman, Sam McDonald, Laura Mullen, and Michelle Oswell. The task force finished their work in April 2011 and prepared this report for presentation at the User Services Council (USC) meeting to be held on April 26, 2011. There was no designated chair for this task force; all work was shared by the group.

A copy of the charge is appended to this report.

History of Chat Reference at Rutgers

As a pilot project, between April 8th and May 17th 2002 the Rutgers Libraries allowed users to ask questions in “real time” using “LiveAssistance,” a web-based call center product from International Business Systems (IBSI), a Chantilly, Virginia based company. LiveAssistance offered most of the features available in a standard call center product—users were asked to provide some basic information upfront; users were placed in a queue; page pushing was available; and transcripts were generated and could be forwarded to the user. The service was available Monday thru Friday from 1 to 4 p.m.; in the 72 hours that the service was available there were 110 chat attempts, 67 of which were successful, i.e., the user and the librarian connected. 1

Despite some issues, it was recommended that the pilot be continued; in 2003-2004 the service was made available Sunday thru Thursday from 7 to 10 p.m. 2 Ten librarians participated in “Ask a Librarian LIVE” and answered 516 questions. However, four librarians who had previously served on AALL opted not to return, most because of professional or personal time constraints. This placed an additional strain on the remaining librarians who now had to devote at least one evening every other week—in some cases ‘on their own time’—to Ask a Librarian LIVE. Without more participation forthcoming, the service was suspended.

1 In the other cases there were either technical difficulties, or the user left before they could connect with a librarian. For the full report on the pilot see http://andromeda.rutgers.edu/~natalieb/asklivereport.htm.

2 For the full report see http://andromeda.rutgers.edu/~natalieb/VirtRef0304.htm
In the Spring of 2007 Public Services Council asked the Virtual Reference Task Force to look at options and make recommendations concerning the expansion of RUL virtual reference services to once again include chat reference. The Task Force focused primarily on two options: participation in Q&A NJ, a federally-funded 24/7 chat reference service managed by the South Jersey Regional Library Cooperative, or the use of Meebo, an anonymous Instant Message (IM) service. It was the recommendation of the Task Force that the latter be the basis for the revived RUL chat reference service.

In the Spring of 2008 the libraries began offering a chat reference service for 15 hours per week—Sundays through Thursdays 7 pm to 10 pm—using Meebo anonymous Instant Messaging. During the hours that the service was available, the Meebo widget appeared prominently on the Libraries’ home page. No login, downloading, or self-identification on the part of the user was required. All they needed to do was type their question in the text box.

The pilot proved enormously successful. Despite the fact that there was no announcement or publicity, in the first 60 hours that the service was available librarians answered 568 questions. As a result, after Spring Break 2008 the service was expanded to include 3:00 to 5:00 pm, Mondays thru Thursdays. Since then there have been gradual increases in availability, currently the service is available 31 hours per week, Monday thru Thursday from 2 to 6 p.m. and Sunday thru Thursday from 7 to 10 p.m. The service continues to be enormously successful: In the 2009/2010 academic year Rutgers librarians answered 8524 questions via Meebo.

Despite its clear success with users, there was a feeling that there were some downsides to Meebo’s extreme simplicity—at least from the librarian’s point of view. There may be periods when 6 or 7 chat boxes pop up virtually at the same time. Until recently, Meebo did not allow multiple simultaneous logins with one username, thus precluding double coverage. Some librarians expressed the desire for a service that would put users in a stated queue, so that when multiple requests are received simultaneously the librarian could deal with questions in the order presented, and users would know where they were in line. Some librarians expressed a desire to have transcripts that could be emailed to the user once the transaction was completed.

In the Summer of 2009, User Services Council appointed a Virtual Chat Reference Task Force that was asked to look at some alternatives to Meebo that might have features that would enhance the service. Specifically the Task Force was asked to look at LibraryH3lp and Spark; the Task Force also looked at Digsby, an Instant Messaging service similar to Meebo. After reviewing the various options, the Task Force found LibraryH3lp to be the most promising. A trial was arranged and the Task Force spent some time looking at the system in more detail. Unfortunately a number of problems were encountered in the testing and there was some question as to the system’s robustness. As a result, it was the feeling of the Task Force that despite some of the features that LibraryH3lp offered it would not be in RUL’s best interests to go with LibraryH3lp at that point in time. The Task Force recommended that until a viable alternative could be identified Meebo be retained as RUL’s chat reference software.

As some participating librarians continued to have the same issues with Meebo, and some time having passed, in the Fall of 2010 the Rutgers Libraries User Services Council charged the
current Chat Reference Task Force to assess the software currently available for chat reference, paying particular attention to features such as queuing and the ability to push pages, and to make recommendations on staffing for the service.

**ARL (Association of Research Libraries) Survey**

In Fall 2010, an MSLIS student looked at our peer/aspirant institutions as well as research universities in the tri-state area: Temple, UPenn, Princeton, NYU, and Columbia to find out which chat services were being used, whether or not they provided text messaging, the hours of their services, and if they belong to a collaborative service of some kind. All of the University of California sites offer a collaborative 24/7 service using Question Point—so UC has been eliminated from the statistics below.

The chat services of 31 libraries were examined.

- 12 use LibraryH3lp
- 9 use Questionpoint
- 3 use Meebo
- 2 use AIM
- 1 uses Digby
- 1 uses Liveperson
- 1 uses Valero

We could not ascertain what service was being used for a few of the libraries.

**Hours of service:**

- 24/7 via collaborative networks: University of California, University of Minnesota, University of Maryland, University of Nebraska, and SUNY Stony Brook

- Others range in hours from: 28 (Columbia) to 130 (University of Arizona, Tucson)

Many libraries provide their own service plus collaborate in Question Point (they note which hours their librarians are available). Some examples of this are: University of North Carolina, Chapel Hill, Michigan State University, University of Washington/Seattle, and University of Florida/Gainesville.

- 16 offer text messaging reference.

The great majority of services offer virtual reference from 8-9-10AM to 9-10-11-midnight on Monday to Thursday. Many also noted that the chat reference service was offered from the reference desk to provide the extended reference hours.

Michelle Oswell spoke with librarians at the Universities of Maryland and Michigan, and although neither school sees as much chat reference traffic as Rutgers both have established chat reference services. Maryland, which uses QuestionPoint to offer local and statewide chat reference, was satisfied with QuestionPoint despite the inability to use the service anonymously.
Maryland uses an interesting scheduling model based on unit availability and the number of reference desk hours the unit provides; members of each unit decide amongst themselves who will staff their requisite number of chat reference hours and when they will staff it. University of Michigan uses Library H3lp and had no complaints or problems with the software. Following Michelle’s initial email conversation with the chat reference coordinator at Michigan, the committee had a very successful chat with one of their reference librarians using Library H3lp in which we tested the various advertised user features, including active feedback when someone is typing and emailing chat transcripts. Melissa Gasparotto spoke with the Coordinator for Virtual Reference at University of Pittsburgh who noted that their chat reference volume was much lower than Rutgers, and was generally administered by a single individual sitting at the physical Reference Desk. Anyone who staffs the physical desk is deemed qualified to staff the chat service, including Reference interns. They do not field enough text reference questions to bother collecting statistics on that portion of the service.

**Meebo Librarian Survey**

In order to gather input from librarians currently participating in the Meebo chat reference service, a survey of possible software features was distributed. Librarians were asked to rate on a scale of 1 to 5 (with 5 being the most important and 1 being the least important), what features they considered necessary in order to provide the most appropriate chat reference service to Rutgers users. Ten librarians responded to the survey. The only feature for which there was a fair amount of consensus was the need for multiple simultaneous librarian login; support for other features tended to range from unimportant to fairly important, with the ability to triage sliding toward the negative (less important) end.

<table>
<thead>
<tr>
<th>Feature</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic queuing of requests</td>
<td>2</td>
<td>2*</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Ability to triage (decide in what order to deal with questions)</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Ability to push pages at users</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Multiple simultaneous librarian login</td>
<td>0</td>
<td>2</td>
<td>2**</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>24/7 availability of service</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>3***</td>
<td>1</td>
</tr>
<tr>
<td>Text access</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Availability of session transcripts</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

*One person added: “Rated 2 if it only queues the requests but gives not flexibility for the librarian to triage. I will rate it 5 if it can do both.”

**One person added: “For busy hours and dates.”

***One person added: “For busy dates.”

When asked what features of the current Meebo service they would not want to lose, most cited the ease of use and the anonymity on the part of the user. Several cited the ability to triage.

When asked what they would like to change, several librarians cited that they would like a system where the connection isn’t so easily lost when users navigate away from that page on the website. Several indicated the need for broader librarian participation in the service. Several indicated that there was nothing that they wanted to change; several said “If it’s not broke don’t fix it.”
Analysis of Available Chat Reference Products

The committee investigated several competing online chat products, representative of the commercial and open source technologies that libraries and business are currently using. They are listed as follows:

Meebo
Libraryh3lp
Refchatter
LivePerson
QuestionPoint
LiveAssistance for Libraries & Reference Desks
Velaro
PHPLive!
AliveChat
LiveZilla!
LiveChat

All products were evaluated using a matrix of characteristics the committee believed were important in maintaining and growing our chat reference service. In the user experience category, we checked for especially desired features including anonymous chatting, active feedback when a librarian is typing, and accessible text (for example, can the chat window can be made larger or read by screen readers?). On the librarian experience side, desirable features were spell checking, active feedback when a user is typing, individual librarian login IDs, simultaneous log-ins, and “canned responses.”

In platform features, the committee was looking for a browser-based service that is easily embeddable in a web page, preferably Javascript- or PHP-based since Flash presents multiple concerns regarding accessibility and usability. Meebo is Flash based and cannot be used on some mobile devices such as iPads (although there is now a free Meebo app for both the iPhone and the iPad). We were also hoping to find a solution that is configurable in terms of layout and design and one that shows stability, that is, the service is reliable and comes with good support and documentation. In addition, we checked each product for special features such as statistics tracking and report generation and the ability to send and receive chat transcripts.

Of the products we investigated, few met most of our basic desired features. Meebo, our current chat product is incapable of being read by screen readers or working with browser-based spellcheckers. Nor does it provide feedback when either a user or librarian is typing. Many of the PHP-based services used by businesses seemed promising, since they offer special features such as canned responses and multiple librarian logins, but only PHPLive! allows enough customization of the chat interface to suit our needs (most particularly, the ability to remove the introductory login screen). Unfortunately, PHPLive! seems to be a moribund service; their documentation has not changed since 2006.
The three remaining products the committee reviewed, QuestionPoint, Velaro, and Library H3lp (the actual software is offered through the Libraryh3lp team, MyCustomerCloud, and Altarama-RefChatter), are widely used in the library community. QuestionPoint, however, is not as flexible or customizable as Libraryh3lp, particularly in that it requires the user to log in before beginning a chat session, and Velaro is a client-based rather than browser-based chat program.

After carefully considering all of the desired features, the committee decided to focus on an implementation of Library H3lp. Library H3lp has all of the desired features, and has been successful in other institutions as a chat service. Library H3lp (in its free iteration), is no longer accepting new signups. There is a vague reference on their website that “new trials will most likely be available again in the summer of 2011.” (http://libraryh3lp.com) The Library H3lp website refers potentially interested parties to two services. The first is called “My Customer Cloud” which is a commercial site selling chats in a “pay by the drink” model. The second service, RefChatter, a commercially available version of Library H3lp, (available from Altarama Information Systems) is the one the committee has decided to recommend. Altarama (www.altarama.com) is a company focused on providing library solutions and has been in business since 2001. The company is based on Australia but has a headquarters in Utah.

Altarama’s RefChatter provides all of the features of the free version of Library H3lp, but includes well-developed technical and customer support. Transcripts and statistics are also available if desired. The committee expects that moving to use of RefChatter will be seamless to the user, while providing an improved, yet familiar experience to the RU librarian. RefChatter will allow for 2 (and up to 3) librarians to work simultaneously if the situation demands.

**Budget**

A price quote has been received from Altarama following an inquiry by Michelle Oswell. An initial request for a quote for Altarama’s RefChatter for a one(1) year subscription for three (3) concurrent users (paid as in two(2) plus another one(1)), and 4 hours remote training & assistance, resulted in a quote for $3,980.00 (quote valid until April 25, 2011). Note that successive years are cheaper as they do not require the training support and thus the ongoing expense would be about $2,985.00. The committee feels that a third user would allow Rutgers to pilot new ways of delivering chat service, such as library-specific or reference desk-based chatting. The RefChatter implementation would need to be assessed after its first year.

Note: We are not, at this time, recommending adding SMStext reference capability which would add $3,250.00 for the first year and $3,000.00/yr thereafter (for 1 phone number, 5,000 message (both inbound and outbound), and 4 hours assistance). Text-referencing is more important for older cell phones. However the service looks the same on smart phones and other mobile devices.

Since RefChatter is a remotely hosted service, not unlike Meebo, no other financial obligations other than fulfilling the Altarama invoice are expected. There will be a few hours needed for set-up and coordination, and even more to train librarians staffing RefChatter (Some training will be done via remote training from Altarama; the rest peer-to-peer within RUL).
Administration Issues

After the initial set-up (colors, labels, features configured on/off etc.) and populating it with the members conducting chat, the day-to-day administration will be minimal and quite like what it was with Meebo.

Website Issues

Replacing the Meebo widget with the RefChatter widget should be quite straightforward once we have the proper credentials and figure out the colors/labels etc. It will present much like the old Meebo widget except that it will use JavaScript instead of Flash. (Natalie has visited the RUL Web Board to discuss chat reference issues as they pertain to the new RUL website that is under development). It has been recommended that it is very important to keep the chat widget front and center on the website front page. This heightened visibility of the chat box is felt to be a direct contributor to the success of the chat service at RUL. Prominence on the website is a recommendation of the task force.

Literature Case Study

Migrating from Meebo to Library H3lp: A case study

An article by Danielle Thiesse-White and others published in Library Hi Tech News, v.26(1-2), pp. 12-17 describes the experiences of Kansas State University in moving from Meebo to Library H3lp. Similar to Rutgers University, Kansas State University has a heavily used chat reference service. The critical change for Kansas State was improved technical support, better statistics and assessment, being able to transfer questions between librarians, and ease of use. For users, the interface need be no different than the one we currently use for Meebo. At the recent ACRL conference, only good things were mentioned about Library H3lp and in particular, the seamless interface with mobile devices. This particular point is critical in moving forward with any chat service. Laura spoke with the article authors at ACRL 2011 and they report continued satisfaction with their implementation of Library H3lp.

Staffing the RUL Chat Reference Service

Staffing

Based on statistics for existing MEEBO Chat reference usage and user feedback, the committee believes chat-based reference to be an ongoing core part of reference service at RUL. Participation in chat reference must be viewed as a way to fulfill the expectation that public services librarians contribute to reference services. Therefore the committee recommends that the service draw from all public services librarians RUL-wide for the purposes of staffing. The committee also recommends a one-year waiting period for new hires before they begin
participating in this system-wide service, in order to give them time to become familiar with RUL.

Current Participation

Currently, 21 out of approximately 40 available public services librarians participate in MEEBO chat reference, covering 31 hours of service per week during the semester. Depending on individual librarian schedules, some participants contribute as little as 6 or as many as 24 hours per semester. On average, participating librarians contribute approximately 18 hours each to the service, per semester, with the bulk of participants covering somewhere between 20 and 24 hours each.

Scheduling

Scheduling is very flexible for chat reference. All shifts may be covered from home, which is a draw for some participants. If chat services are expanded into the morning hours, there will be additional scheduling flexibility. It has been noted that the 3 hour evening shift may be too lengthy, and with higher participation rates the schedule could be broken up such that no shift lasts longer than 2 hours.

All shifts are entered into a shared Google Doc spreadsheet, which allows participants to view the schedule and add statistics from their shifts. This method currently works very well.

Training

The committee recommends regular training sessions for chat reference services at RUL. This practice will serve to demystify the service for those who do not currently participate, as well as provide new hires with an introduction to the service. The committee recommends the development of a demo and documentation for the training sessions. The committee recommends holding two informal “brown bag” informational sessions once a decision has been made on the change to RefChatter. All interested librarians could see a product demonstration and ask any questions about participation in chat reference. These sessions could be planned and scheduled during the summer 2011; a Fall 2011 implementation of RefChatter live would seem likely.

Hours of Availability of the Service

The committee is recommending (pending additional librarian participation), a move to extending hours into the morning on Monday through Thursday, adding the hours of 10-12 a.m. each day. Other days and hours will stay the same as the current Meebo service. The schedule of operation of RUL chat reference may change depending on factors such as pool of available librarians, use of simultaneous librarians at busy times, and changing the duration of the 3 hour evening slot.
Moving Forward

Participation in Collaborations

The demise of QandA NJ, which was a heavily used service, may have an impact on Rutgers chat services. Currently, despite the highly visible presence of the Meebo chat widget, virtually all of the use of the service is by Rutgers users. The lack of a statewide service might mean increased use by non-Rutgers users. At some point we may wish to investigate collaborative opportunities with either VALE or regional libraries.

Better Statistics and ongoing Assessment

Currently there is a lack of consistency in how individual librarians count reference transactions. This holds true not just for chat reference but for reference desk interactions as well. The Task Force recommends that the User Services Council consider this issue and recommend a uniform standard.

Canned Responses

Canned responses for repetitive questions need to be built into the service. The task force believes that it will be possible to develop an in-house solution that uses customized canned responses. Katie Anderson and John Gibson have worked on good solutions to this problem.

Link for Mobile Users

RUL will need to investigate how we can use RefChatter for a mobile site (with larger site redesign). It is recommended to provide a link to a mobile version before a website redesign (if possible).

Texting

RUL can continue to investigate whether SMS reference capability is suitable, affordable and desirable.

Workload concerns

Workload issues seem to be the greatest limitation to expansion of in-demand services. We need to assess underutilized services in order to expand other more in-demand services such as virtual reference. We continue to try to do more with less. We have the same or fewer librarians- and other services have not decreased that much given current staffing.

Suggested Timeline

- Request Invoice and Contract
- Contract Review
- Pay Invoice
- Meet with RefChatter technical support and get documentation and access codes
- Arrange training sessions
- Decide colors, user views, etc.
- Set up demos and conduct training
- Pick launch date (Summer 2011 training, Fall 2011 rollout is considered feasible)

**Conclusion**

The task force’s final recommendation is to implement Altarama’s RefChatter for two simultaneous users (librarians), with the option of a third (may go to two after one year) beginning as soon as is feasible following signup and payment. The committee feels that use of RefChatter will allow for a better experience for both librarians and users without changing any of the preferred features of “Meebo.” The addition of dedicated technical and customer support will be an important addition to our implementation. We anticipate more librarian participation and some expansion of hours (adding 10-12 a.m Monday through Thursday). The busy chat service at RUL will be enhanced for both librarians and users through use of this new product. Any member of the Chat Reference Services Task Force is available to answer any questions pertaining to the content of this report.
Appendix
Chat Reference Services Task Force
Charge to Task Force

The RUL Strategic Plan Goals and Objectives include, among other things,

- developing “services that facilitate scholarly communication and support the research in process among researchers at Rutgers” (I.G), and
- continuously improving “services by utilizing assessment and accountability indicators that measure needs and impact.” (I.J)

At its September, 2010 meeting, the User Services Council once again addressed the need for an assessment of the various chat reference services and software currently available and the need to determine if a new platform is feasible for our use. To that end, I am asking a task force to do the following:

- Determine and defend an ideal service model for RUL at each of three levels: minimum, extended, and maximum desirable hours of service and staffing needed at each level. Use existing statistical data in supporting your models.
- Recommend whether this should continue to be a volunteer service or a service that draws upon all public service librarians.
- Investigate existing options, including the current Meebo, for providing chat reference services for library users. At a minimum, include information on
  - queuing and number of simultaneous users possible
  - ability to provide FAQs for users
  - adaptability for users with mobile devices
  - ability to push pages
  - flexibility for staffing the service
  - other
- Provide the pros and cons of acquiring each of these options.
- Be open to and investigate opportunities that may become available with VoIP installation.
- Assess the costs affiliated with each service option as they would apply within the RUL context.
- Determine what data each system can provide for assessment, e.g. number of dropped questions, number/duration of queries, questions received/answered per day/hour, etc., consulting with the AUL for Planning and Assessment as needed.
- Recommend, in priority order, the preferred options for RUL.
- Offer suggestions regarding the implementation of preferred options, including key actors in the implementation process, estimated time line for any changes to the current Meebo system, impact of a transitional period on our users, and suggestions for roll-out of any new service.

The Task Force shall operate under the auspices of the User Services Council and report both to the Council and to the AUL—Research and Instructional Services. Anticipated deadline for a report is February 15, 2011.