

Electronic and Live: Online Reference Two Years On

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Abstract:

When the Information Commons at Holmesglen Institute of TAFE introduced a Live Help reference service in January 2002, it became the first Victorian TAFE to develop a synchronous online reference service. Email reference had been introduced earlier with little success but this did not discourage management; rather it confirmed the need to embrace a new technology that today's Internet savvy students are familiar with. Email and telephone reference are still available, but the success of Live Help has proven that a virtual reference service can be developed at a TAFE level. This paper will discuss the experience of setting up a digital reference service; the aim is to put this work into an historical context and to show that you don't need enormous budgets or extra staff in order to successfully implement such a service.

Introduction

“... I am a trafficker of information, I know everything I can. The question is, do you know why you are here?”(Wachowski, 2003) How many of us here saw the film The Matrix Reloaded? This is a quote from the character called The Merovingian, a dangerous computer program residing within the Matrix, who describes himself as an information trafficker. I sat up and took note of this, thinking “Yes! This is what we do as librarians - we traffic, we deal, we trade in information and, for the most part, our clients don’t know why they are here”.

Online reference chat services facilitate this trafficking of information. Compared to the Matrix, where an individual can physically plug into a virtual world, our current technology is embryonic. A major step towards creating virtual worlds and towards moving further into cyberspace has occurred with the advent of online chat rooms. People have set up whole ‘virtual’ chat communities. They get together in chat rooms and they converse about common interests. You can be sure that there will be a chat room for nearly every subject imaginable.

Chat History

The precursors to chat rooms were BBS (Bulletin Board Systems) which developed in the late 1970’s. Ward Christensen and Randy Suess developed the first Computerized Bulletin Board System (CBBS) in Chicago in 1978. (History of the Internet, 1999) In 1979 they made their invention available to the public; this saw the first electronic message-posting network. “CBBS operates like a virtual thumb-tack bulletin board. Participants can post messages to a public ‘board’, and others can read and respond to those messages, creating an ongoing virtual discussion.” (History of the Internet, 1999)

From these early Bulletin Board Systems, Bitnet Relay Chat developed. This was an early precursor to Internet Relay Chat (IRC), which developed as the chat we are using today. Digital chat (also known as virtual chat or online chat) developed from these early bulletin boards, but all are synonymous for what is known as synchronous or ‘real time’ chat. The first IRC chat program was developed in August 1988 by Jarkko Oikarinen at the University of Oulu in Finland. His mission was to develop the existing BBS to make it more ‘usable’. “By November 1988, IRC had spread to networks across the globe”. (Oikarinen, 1993)

Private industry has poured millions of dollars into research and development of real-time customer support software, including online customer chat software. The market for customer-interaction software ‘is estimated to reach \$3 billion in annual revenues by the year 2000.’ (Lipow, 1999) In actuality, by 2001, the global customer relationship software market was worth 7.4 billion dollars. In 2001, Peoplesoft earned revenue of 400 million US dollars, and E-Gain software earned revenue of 45 million US dollars. (Hewson Group, 2002). It is this commercial customer support software that libraries have embraced for online reference services. Some suppliers have further improved the original product in order to provide enhanced support to libraries.

The senior library information systems coordinator from the University of Illinois, Bernie Sloan, has identified some of the longest running reference chat services. These include, SUNY (State University New York) Morrisville, which has been running a chat service “in one form or another” for about four years; Temple University (Philadelphia, PA) which has

had a service running since November 1998 and the University of North Texas which has operated since May 1999. (Sloan 2001). In the last five years, many academic libraries around the world have installed digital reference chat systems; however, in Australia this is a relatively new phenomenon, with the first such systems being implemented in late 2000 and early 2001.

Background to Holmesglen adopting online reference chat

In 2001, my predecessor and the Waverley Information Commons Branch Manager were awarded a TAFE Staff Development Travelling Scholarship. This afforded them the opportunity to travel throughout the USA and Canada, investigating eLearning developments in eight post- secondary institutions.

The objectives of the trip were:

- “Investigation into how information professionals have embraced their roles in this new environment, which incorporates e-learning.
- Examination of best practices for collaborative communication between educators, IT staff and information professionals.
- Appraisal of services designed to support e-learning students and whether they are suitable for implementation in Victorian TAFEs.
- Examination of the move in libraries from sole emphasis on developing resources to developing a wider environment that supports the learner.
- Examination of how students accept, and perform in, an on-line environment, and the training required to enable students to get on-line and stay on-line.
- Assessment of the software and hardware requirements and technical support that is required to enable the viability of e-learning courses.” (Mare, 2002).

On returning to Australia, they recommended to management that Holmesglen Information Commons trial a digital reference service.

This was based on the following findings:

“Adapting services to an on-line environment is very important if we are:

- To maintain a client group. It is very easy for people to assume they can search the web and no longer require professional assistance. In order to survive and stay relevant to our clients, we have to create an environment that responds to their needs in a direct, interactive and timely fashion.
- To provide a more efficient, technologically savvy library service to clients and in the process reach a larger client group, making ourselves more important to them, thereby ensuring our survival.
- To add value to the organization and receive recognition and continuing funding.
- To demonstrate relevance in a competitive environment where there are a growing number of alternatives for information provision
- To assist the parent organization maintain a competitive advantage in the marketplace” (Mare, 2002)

An email reference service had already been established. This had had some success, although it didn't really live up to expectations in terms of use. The average number of reference emails was only 2-5 per week. As a consequence, management were keen to enhance this service with an online synchronous service. The rationale for the trial was that email reference was too slow. With a 24 hour turn-around users weren't prepared to wait that long for answers whereas with online reference chat, answers can be instant and in real time. The trial also supported goals and objectives in the Holmesglen Information Commons strategic plan. These include a commitment to providing students and staff with up to date and innovative online services. The trial of reference chat software would make Holmesglen one of the first educational institutions in Australia to introduce this technology. The only other educational institution doing the same thing (2000 – 2001) was Southbank TAFE in Queensland. At that time they were using Human Click software (which has subsequently been bought by LivePerson).

Selection of software

Several brands of software were considered for the trial. These included LSSI, Human Click, and LivePerson. LivePerson was selected predominantly for its affordability; for us this means \$3750 USD per annum which translates to roughly \$6,000 AUD per annum depending on exchange rates. This cost covers a one-seat license and is considerably cheaper than LSSI for example. As a comparison, LSSI costs approximately \$15,000 AUD for first year and startup and then \$10,000 AUD per seat per year. While cost was the one of the major factors determining our decision, LivePerson software was also chosen because it provides the following features:

- No special software or hardware is needed.
- Multiple browsers are supported.
- Ability to “push” a patrons' browser to a desired page.
- Ability to send active URLs.
- Ability to survey user.
- Logging of transcripts for future reference.
- Provides searchable transcripts.
- Comprehensive reporting for statistical purposes.
- Ability to create ‘canned’ responses for frequently asked questions.
- It identifies patrons by IP address.
- Fast response time. (Dependent on local network)

LivePerson does not provide on-site training (the company is based in New York, with technical support in Israel), but its online 24/7 chat support service is excellent and comprehensive documentation is provided on its website. I have easily taught myself the software, both as a user and an administrator, without the need for on-site training. Library staff have found it to be easy to use once they have had training. 100% of our exit survey respondents found the service easy to use from an end-user perspective. (See Figure 9)

While many larger institutions were setting up committees to investigate the feasibility of a digital reference service and compiling guidelines for such a service, Holmesglen Information Commons embarked on a trial successfully implementing the service with neither a service

guideline nor committee in sight. One advantage of being a smaller institution is that we can act quickly and autonomously without getting lost in red tape.

The six-month trial began in January 2001. Initially there was a problem because the Internet connection was too slow. We kept on losing connectivity to Live Help. This was nothing to do with the product but it stopped the service in its tracks. Eventually, the Institute bought more Internet bandwidth, which solved the problem. When I came into the job in April 2001, the software had been set up, but the speed of development meant there were no service guidelines, limited user documentation and no extra staff. More importantly, no marketing had been undertaken, so this was the next obvious step.

Marketing

A good marketing campaign is vital in promoting a product or service, and this is no different with a digital reference service. Without good marketing, your service will not be developed to its full potential; it will stagnate and eventually fail. “Marketing real-time online reference service is crucial. In order to demonstrate the need and value for this non-traditional reference service and to justify further funding, libraries need solid data showing that the service is desired by their users, that it attracts enough use to validate moving staff resources to support it, and that it is a quality service.” (Wenzel & Horowitz, 2001)

Initially, I promoted the service through an article in the Holmesglen TAFE monthly newsletter and through emails encouraging teaching staff to promote the service to their students. We were expecting the service to be inundated once the emails were sent out, but we found that instead of the hoped for increase, use of the service developed slowly but surely. (See figure 1.) I customised the chat button, from the generic LivePerson button, to something that was identifiable with our website and Information Commons branding. We called the service “LiveHelp”. The LiveHelp button was then embedded in every page on our website as well as some of our customisable online databases. As yet it has not been added to our online catalogue since we will be moving to a portal version in 2004. Once this is done, the button will be embedded in the new product.

I also encouraged library staff to promote the service in our information literacy classes and this has proved very successful. Often however, the librarian staffing the service would be inundated with all 20 students in a class wanting to chat! Learning from this experience, librarians in information literacy classes now explain to students that there is actually only one person staffing the service so “please don’t all click the ‘Live Help’ button at once”.

Without a doubt, the most successful marketing strategy thus far has been the running of an Institute-wide competition. The competition was called “Who am I?” and it was open to all staff (except library staff) and students throughout the Institute. Staff/students came into the reference chat room to get the clue for the day. There were five clues for the week. At the end of the week, after getting each clue for the day in the chat room, they had to guess who the mystery celebrity was.

The answers were preloaded into the canned responses database of the LivePerson software, which made it easier for staff to handle the questions. Once users had guessed who the celebrity was, they could put their name into the draw to win prizes. These were obtained by

ringing and asking places such as Hoyts, Borders and the Comedy Club for free passes in exchange for sponsorship advertising on all the competition promotional material. I also arranged for the Institute restaurant to donate lunch for two as a prize. Promotion of the competition took the form of coloured posters, placed around all the campuses, in cafeterias, computer labs, Information Commons branches and on bulletin boards. The competition was also advertised on the front page of our website, and we had leaflets to distribute to staff and students across the campuses. The response to the competition was enthusiastic. Staff were particularly supportive. Although it was held in mid-October, when students were preoccupied with study and deadlines, the response from students was still good.

I think, however, to totally capture the student interest we should have had a Playstation or Xbox as the major prize, but unfortunately we don't have the budget to offer such expensive prizes. In 2004 we are planning another competition and will offer a cheaper electronic prize in order to attract more students to participate; a digital camera, MP3 player, Walkman, or webcam are some ideas. As we launched a new website recently, the theme of the new competition will be "Explore our new Website". Participants will come into the chatroom to get clues about where on our website they can find various resources. They must then go and explore the Information Commons website to find an answer to the clue. The strategy behind this is twofold; it will promote both our new website and LiveHelp.

Staffing and training

The reference chat service commenced within existing resource constraints. Indeed, we have continued to run the service with current levels of staff. Initially the service was based at the Building 8 Information Commons where the service was staffed at the Information Services desk. Staff answered regular in-person reference queries as well as telephone and LiveHelp enquiries. Staff at Building 8 had previously had introductory training prior to my appointment. Some were still very nervous about the technology when I came into the position, but we embarked on comprehensive training for staff, mainly to increase confidence in using the software and to help them overcome any concerns. This was particularly important as I was also beginning to market the service and was expecting use to increase.

Use certainly did increase and it became considerably harder for staff to juggle LiveHelp, phone and regular reference work. We tried staffing the service from our workrooms, but it was apparent early on that this was not viable. For a start, staff became concerned about being rostered on the Information Services desk as well as LiveHelp, which effectively doubled their quota of "desk" shifts. At this point we decided to de-centralise the service. Branch staff up to this point had had virtually no experience with LiveHelp but we decided to roster each of the four branches to be responsible for staffing the service for one week each month. This has worked well, particularly in giving branch staff 'ownership' of the service. When it gets busy at the desk, staff queue and prioritise chats just as they would any other enquiry. We have canned responses that can tell a student we are currently serving someone else and could they please wait. If it is busy and someone comes into chat, staff must pick up the chat, just as they would pick up the phone if it were ringing, and then they may put the student on hold once they have acknowledged the chat. If it gets really busy in the chat room and on the desk, staff can call for backup.

Before de-centralising the service, all the branch staff were trained in use of the software and also how to conduct a reference interview online. This included showing staff examples of previous transcripts of good online interviews as well as not so good online interviews. Having a record of all transcripts has been informative for evaluation purposes. Staff are anonymous when they are online in LiveHelp. They appear to users as “Information Desk”. Some staff have rung me sounding anxious, to say “ I was just in a chat session and the student was being really rude and I was trying to help them and they just disappeared – I hope it doesn’t look too bad when you read the transcript”. I actually don’t have time to read through all the transcripts. Once a month, when I do my statistics, I do read some of them, enough to glean what needs improvement, but I certainly do not take the time to try and identify who was staffing the service for that particular day and at that specific time. I explain to staff that it is NOT my job to police their reference work. The availability of transcripts, if anything, has made management aware that staff need further training in conducting a reference interview, particularly online. Since identifying this, I have conducted further training in online reference interviewing and it is interesting to note that in the last several months, the quality of chat transcripts has improved significantly in terms of the level of service our staff are giving.

What are we being asked?Everything!

The following is a small selection of the types of questions we are being asked.

Note that students are quite au fait with chat jargon, shortening words such as ‘you’ to ‘u’.

“i need ti identify the causes and consequences of offending behaviour in juveniles...will u be able 2assist me with any books, websites or journals which i could use”

“Have u got terminator on DVD?”

“hello how are ya? I was just wondering if u know any good statistic sites?”

“hi i'm doing a lecture on 'sources of criminal and statute law" and i'm not sure where to look for information about this topic”

“Can I obtain an Age article dated Nov 24 1996 (Sun Age)?”

“Hello, I am in the Standards online database and I wish to view a document but it wont come up”

“Hello there, I'm looking for information on the benefits to an organisation of mentoring younger staff members. In particular people who have to make quick, expert decisions, passing that decision process on to people who already have a high degree of skill?”

“Hello, my teacher ask me to set up a intranet email. could you tell me how to set up a holmesglen email address”

“Are you able to help me locate any information on Chinese religion and behavioural patterns”

“i need 2know who migrated in the 40s and 50s and why did they migrate? also...how Australia has benefited from migration”

“Hi, just wanted to know how I can renew my books over the internet”

“I am looking for my past records at moorabbin tafe”

“When does school holiday start in November?”

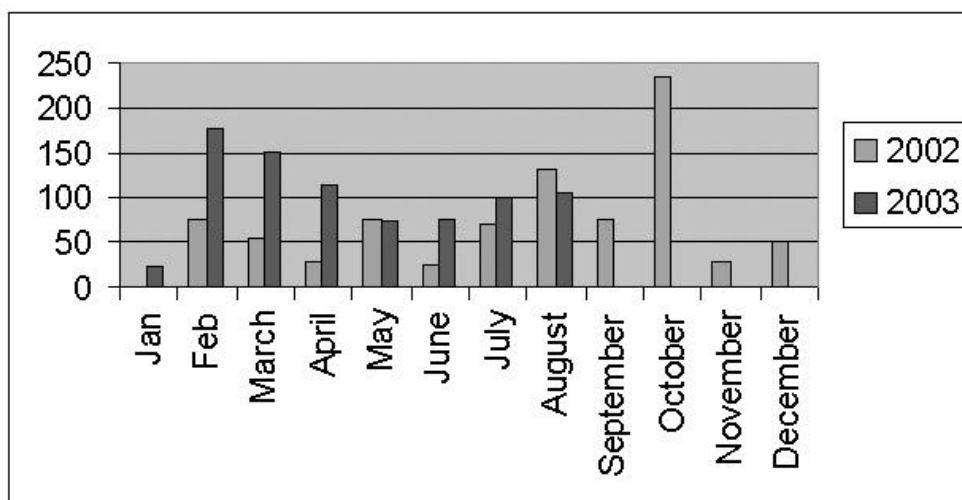
Statistics

Bernie Sloan (2001) surveyed 56 libraries in the US offering digital reference services. His research found that 'while academics (libraries) averaged 61 questions per month, the actual numbers varied quite a bit by library. Eight averaged less than 10 questions a month, 3 averaged between 10 and 20, 11 libraries averaged between 20 and 50, 8 averaged between 50 and 100 questions a month, and two averaged more than 100. The busiest academic averaged nearly 600 questions per month.'

Based on this data, reference chat at Holmesglen is slightly above the average of 61 chats per month. The actual average at Holmesglen is 69.7 chats per month. As a comparison, we had nearly 900,000 students through the Information Commons doors (across all campuses) in 2003. They asked us just over 73,000 face-to-face questions (a drop from the previous year of 80,000 or 8.6 %) and they borrowed nearly 135,000 items.

Live Person software has comprehensive reporting features for compiling statistics. This includes offline clicks, offline emails, online clicks, chat requests (See figure 1), pre-chat survey, abandoned chats, exit survey, average wait time (See figure 3), and average contact time (See figure 4). Reports are kept in a database on the Live Person website. Subscribers log in to their account on the LivePerson website in order to run reports and access statistics.

Chat requests.

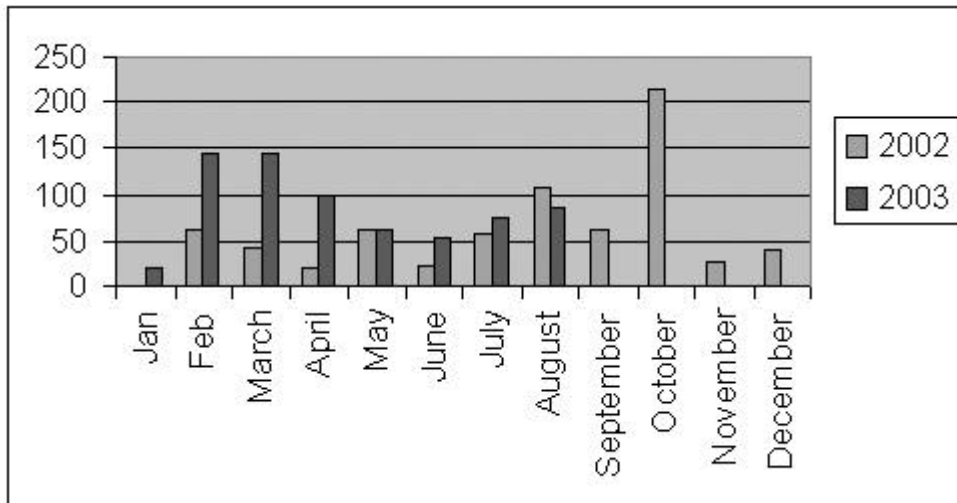


(Figure 1) Chat Requests

This graph includes all requests for chats, including users who came into the chat room and also users who requested a chat but abandoned it before coming into the chat room.

The peak in October 2002 was when we ran the "Who am I ?" competition.

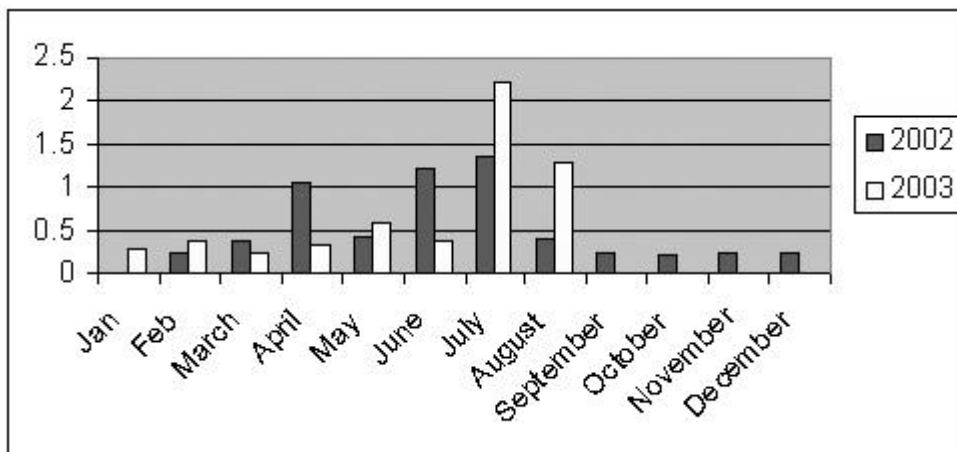
Total chats.



(Figure 2) Total Chats

This graph reflects the number of users who actually came into the chatroom. Again the peak in October 2002 was when we ran the “Who am I ?” competition.

Wait time

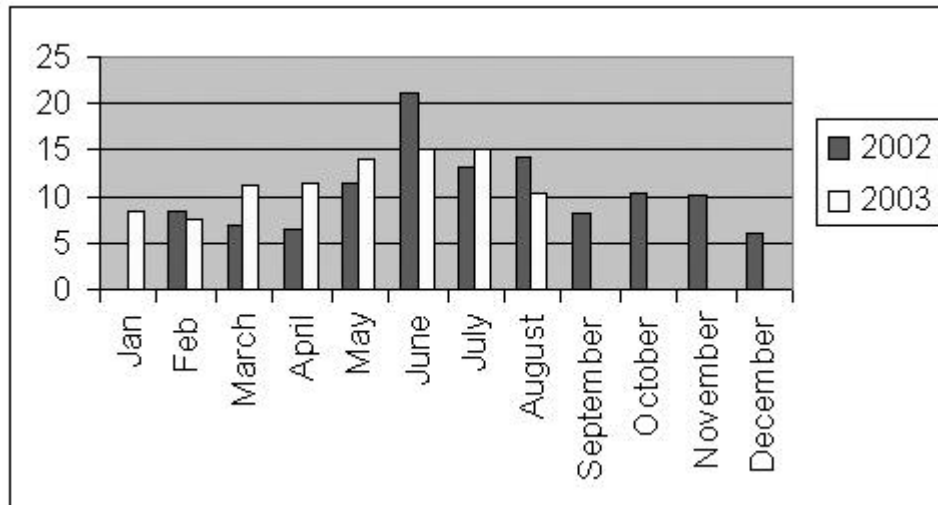


(Figure 3) Wait time

This graph reflects the time a user had to wait (in minutes) in the chat room before being answered by a librarian. The average wait time is 0.58 seconds.

The peaks in July and August 2003 were when we decentralised the service; branch staff were still training on the software and therefore response times were slow. It is also the start of term and traditionally a very busy time too.

Contact time



(Figure 4) Contact time

This graph reflects the average contact time per chat session in minutes.

Average contact time is close to 11 minutes. (10 minutes, 50 seconds)

As a comparison, the Washington Research Library Consortium (WRLC), a digital reference consortium of nine academic libraries in the Washington D.C district, found that “research from the virtual reference pilot project indicates an average session is 13 minutes” (WRLC, 2003)

It is interesting to note that the peak times (June and July) are when exams and assignments are due before mid-year break at Holmesglen.

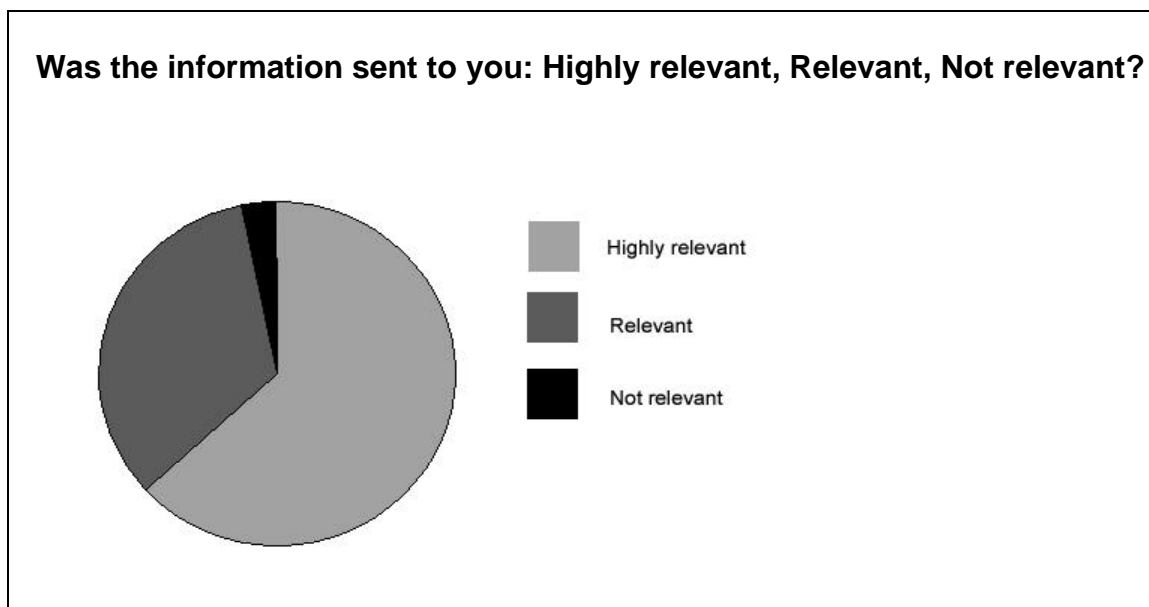
Exit Survey Data

Between 10 and 15% of users fill in the exit survey which pops up automatically when they exit the chat room. This is the data gleaned from the survey.



(Figure 5) How did you find this service?

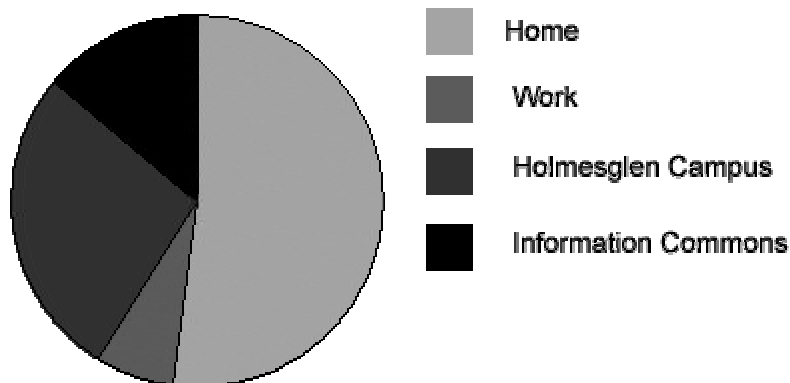
It is interesting to note that students who rated the service as 'Fair' or 'Poor' were generally looking for services such as renewals on their items which then could not be renewed because they were late or because someone had a reservation on the items. Or they rated the service as 'Poor' when we had to refer users to another department. This was particularly the case when they asked us for teaching department - specific information such as timetable changes. Using this service, they expect the information to be immediate and instant, not something they have to follow up. That is, they are not expecting to be referred on.



(Figure 6) Was the information sent to you: Highly relevant, Relevant, Not relevant?

Again, the 'not relevant' was generally where students were referred elsewhere.

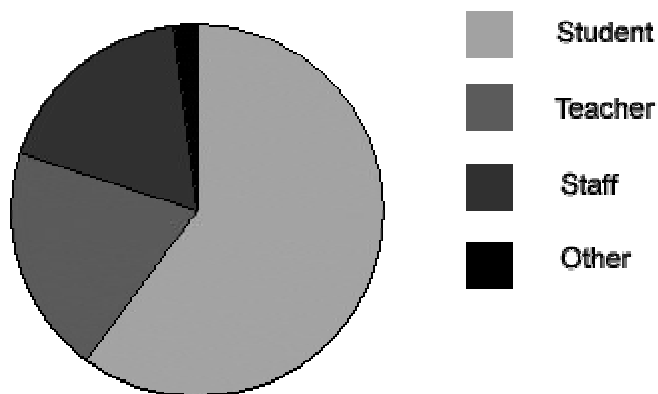
Were you using this service from: Home, Work, Holmesglen Campus, Information Commons, Other?



(Figure 7) Where were you using this service from?

The majority of people are using the service from home, followed by people using the service on campus and within the Information Commons.

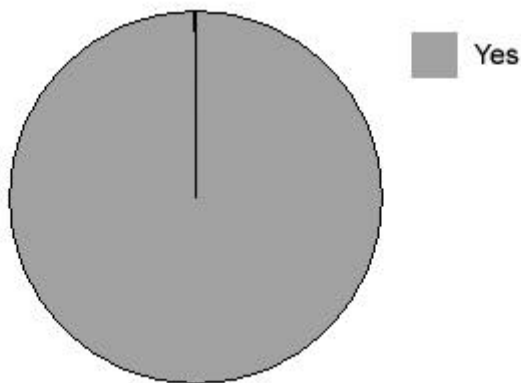
Are you: Student, Staff, Teacher, Other?



(Figure 8) Are you Student, Teacher, Staff, Other?

The majority of users are students. Staff includes Holmesglen administrative and non-teaching staff. The Other group are usually external people wanting to find out about courses offered at Holmesglen. We have also had external librarians in this category looking at how the system works from a user's perspective.

Did you find this service easy to use?



(Figure 9) Did you find this service easy to use?

100% of users found the service easy to use.

Conclusions

With academic libraries spending thousands and possibly millions of dollars on subscriptions to online databases and electronic resources, and with students relying more and more on online information and expecting instantaneous answers, it is imperative that we have the tools to lead students through the myriad of confusing information resources. More and more students are studying online and no longer come to a campus as such. There are approximately 63,000 students enrolled with TAFE VC (Virtual Campus) alone. And of course this does not include the thousands studying online with universities and other academic institutions.

Online chat services facilitate us to support off campus students as well as regular students. Systems need not be expensive, with several cheaper options being available. The first could be a consortium subscription arrangement with institutions grouping together to share resources, similar to database subscription consortiums. Something like Yahoo or Microsoft instant messaging services could also be used as a good alternative and these are free. While these may not have many of the features of commercial packages, they could still be successfully used as cheaper alternatives.

Our chat service is currently offered during Information Commons opening hours which are Monday to Thursday 8am – 9.30 pm, Friday 8am – 7pm, Saturday 8.30am – 5pm and Sunday 11am – 4pm. Our future plans include developing this into a 24/7 service (or close to) by utilising different time zones. In 2004 we will be investigating the feasibility of developing a consortium with Southbank TAFE in Queensland and possibly a TAFE in Western Australia and a polytechnic in New Zealand in order to make the most of different time zones.

Our experience developing our Live Help service has been a positive one. While our staff have had a steep learning curve, they have nevertheless gained new skills in a variety of

areas. It has made us aware that there is a need for this service and that our students are keen to embrace this new form of technology. In particular, students can have more extended help as chat queries can be longer in duration (See figure 4). Students will go off and search a database or information we have pushed them and then resume the chat if they need any further assistance.

One day, patrons will perhaps be able to physically plug into a virtual world like the Matrix. They may possibly interact with a computer program that takes the appearance of a librarian and shows them virtually where they can find information. Paradoxically this may not be too different to what is happening today in the 'real' world. It will be interesting to see how online reference services develop in the years to come.

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The following is a list of digital reference resources. This list is not exhaustive. These resources are in no way endorsed by the Author and are meant as a guide only.

Software

Commercial

24/7 Reference

<http://www.247ref.org/>

eGain

<http://www.egain.com/>

Live Assistance

<http://www.liveassistance.com/>

LivePerson

<http://www.liveperson.com>

LSSI

<http://www.lssi.com/>

Free

Rakim

<http://www.horde.org/rakim/> see also

<http://rakim.sourceforge.net/>

Open source license

Instant Messaging Software

“Instant messaging software products such as AOL Instant Messenger and ICQ allow librarians to communicate in real-time with patrons through a series of messages sent back and forth. Instant messaging products enable librarians to indicate their availability on a contact list, share URLs and files with patrons, and record sessions (Yue, 2001). These products are free but must be downloaded on both librarians’ and patrons’ computers. Instant messaging products include chat features, offering the option to communicate synchronously in a shared environment.” (Kasowitz, 2001)

AOL Instant Messenger

<http://www.aol.com.au/site/website/aolproducts/aim/index.php>

ICQ (I seek you)

<http://www.icq.com/download/>

Microsoft Messenger

<http://messenger.microsoft.com>

Yahoo Instant Messenger

<http://messenger.yahoo.com/>

Selecting digital reference software

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