

Slide 1

# Collaboration in Online Reference

When the whole is greater  
than the sum of its  
part(ner)s

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Good afternoon.

The focus of my presentation today is all about operating a reference service in a collaborative. In particular I'll be describing the AskNow chat reference service.

This service is an initiative of National & State Libraries Australasia (known as NSLA) and I am the service manager, based in the National Library of Australia.

AskNow has been a very popular service over almost 5 years – almost 20,000 enquiries last financial year.

This is due to a number of success factors – the main one being the collaborative nature of the service governance.

## Outline

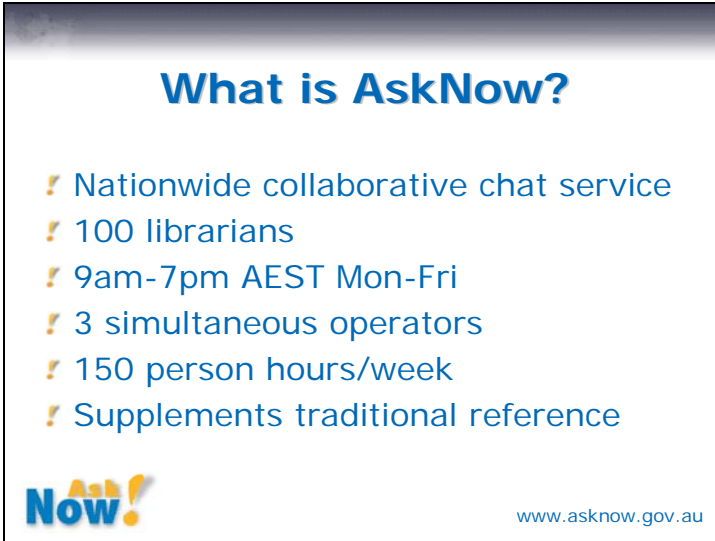
- ! AskNow as a collaborative
- ! Decisions, issues and success factors
- ! Collaborating with our users

**Today I will be discussing**

**How we manage the collaborative aspects of the AskNow service.**

**I'll then move on to highlight what I consider to be key factors in any collaborative and how our experiences in AskNow ?bear witness to their importance**

**And finally I'll touch on the collaboratives I think online reference services can't afford to ignore – collaborations with our patrons in a world where so many are connected via computer. It's in this networked community that libraries can act out there next collaborations.**



**What is AskNow?**

- ! Nationwide collaborative chat service
- ! 100 librarians
- ! 9am-7pm AEST Mon-Fri
- ! 3 simultaneous operators
- ! 150 person hours/week
- ! Supplements traditional reference

**AskNow!**

[www.asknow.gov.au](http://www.asknow.gov.au)

**So what is AskNow?**

It is a national, Australia wide service which also includes librarians from New Zealand.

Based on chat technology (and more recently Instant Messaging) – it must be acknowledged that it is the progress of technology that has allowed reference services to be more collaborative.

AskNow was developed both to extend the hours of availability of the reference desk and also to experiment with the new technology of chat.

The service is free to anyone – no library card, password or login is required.

We have almost 100 operators from national, state and public libraries rostered between 9am and 7pm AEST Monday to Friday.

This spans 4 different time zones, rising to 6 during daylight saving, when there's a 5 hour time difference for some of our partners. If we go ahead with a proposal to join a US fulltime Coop we will dramatically expand the number of hours to 24/7.

We have a minimum of 3 operators working simultaneously depending on time of the day and which month it is. This equates to some 150 person hours per week, divided according to the size of the library. For example we at the National Library of Australia are rostered on over 20 hours per week, while a small public library may be on one hour per fortnight.

In each of our partner libraries, AskNow supplements the traditional reference services.



So, why collaborate? What I've represented here are the key success factors of the collaborative model that have made AskNow sustainable.

We have the institutional fit in the governance model of NSLA.

We can build on the existing pool of reference skills and experience in our partner libraries.

We are able to share costs and resources giving a vastly increased chance of viability and return on investment.

Underpinning the service is the principle of equitable access across economic, cultural and geographical divisions. As government authorities we all operate under a universal service delivery mandate.

Operating flexibility is possible because we have almost 100 librarians and in this instance the 6 time zones enable extended opening hours.

And finally, the AskNow collaboration is a model for other reference ventures on a national scale. It has opened up the way for further collaborative effort for reference services.

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**Our librarians are the backbone of our service.**

**[Count 1, 2, 3, 4, 5]**

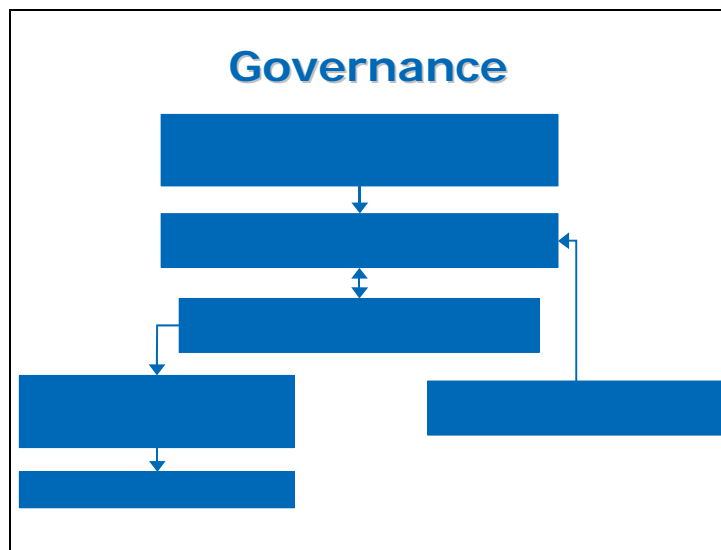
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**And some more [turn to screen and smile!]**

**[Count 1, 2, 3, 4, 5]**

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How are these real live librarians organised to provide this service? It's all about collaboration and this is the governance model that makes it possible.

AskNow is an initiative of National & State Libraries Australasia (NSLA) - formerly know as the Council of State Libraries (CASL).

This group of CEOs has authorised a Steering Committee of reference service managers from the national and state libraries to operate AskNow on its behalf.

As Service Manager, I coordinate the operational activities of the service with the

Service Team made up of representatives from each of the partner libraries.

They in turn manage the participation of the Public Libraries in their states.

The slide is titled "The Cooperative Framework" in a large blue font. Below the title is a bulleted list of five items, each preceded by a blue exclamation mark icon. The items are: "Legal deed", "Formal reporting", "Communication", "Underwritten by a Business Plan", and "Regular evaluation". In the bottom left corner, there is a logo for "Ask Now!" with "Ask" in orange and "Now!" in blue. In the bottom right corner, the website address "www.asknow.gov.au" is displayed in a small blue font.

## The Cooperative Framework

- ! Legal deed
- ! Formal reporting
- ! Communication
- ! Underwritten by a Business Plan
- ! Regular evaluation

Ask Now!

www.asknow.gov.au

A legal deed of agreement between partners guarantees finances and resourcing. The NLA provides service administration and overall legal responsibility.

A formal reporting regime includes a service update to each NLSA meeting.

Communication is a mix of f2f meetings for the steering committee, monthly teleconferences for the service team, a listserv, an operators blog and wiki.

Without this existing formal governance structure it's unlikely the AskNow service would have commenced and been sustained for 5 years.

The service is underwritten by a two-year Business Plan that sets the cooperative management, communication and reporting framework.

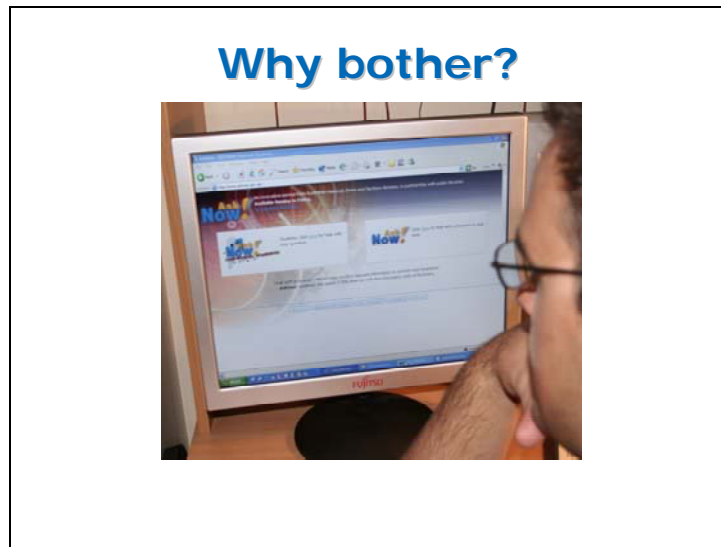
For about the first 2 years of operation a pilot project tested the service concept and the commitment of partners.

2005-07 was a consolidation period and

now as we enter the next two year cycle, the business model is being reviewed again.

Informing the Business Plan review is a regular evaluation process overseen by the SLNSW. This process consists of an annual client survey and a full scale biennial evaluation report, measuring the effectiveness of the service.

The most recent 2006 evaluation employed a combination of transcript analysis, questionnaires and electronic bulletin boards but also focused on some qualitative analysis to assess the impact of the service for clients. This was our most comprehensive evaluation to date with almost 1,000 transcripts being analysed and 90% of our operators providing feedback.



**So... I've explained what collaboration means for us in offering the AskNow virtual chat reference service.**

**Now I'd like to raise some "points to ponder", because after all this presentation is really for you to pick out what is relevant to your situation.**



**These are quotes from an article on collaboration in the public service. The article appeared in the latest issue of the local Canberra Times supplement “The Public Sector Informant”. Of course it’s not focused on collaboration in library reference but it does serve very well to put our endeavours in context.**

**Collaboration is a focus of governments at present**

**Collaboration has value in promoting ideas, talent and even passion**

**And more tangibly, it’s about combining skills and aligning assets**

**However, let’s be realistic ... it can also not necessarily be a good thing – badly conceived and managed collaboratives can have few real benefits and may in fact be a liability for all concerned.**

**Before entering any collaboration it’s only common sense to be aware of the benefits and potential pitfalls that can occur when two or more different cultures come together.**

## Decisions

- ! What type of involvement is sought
- ! For how long
- ! What resources are needed
- ! Can the partners deliver
- ! Is evolution factored in

These are some decisions that need to be made when entering into a collaborative:

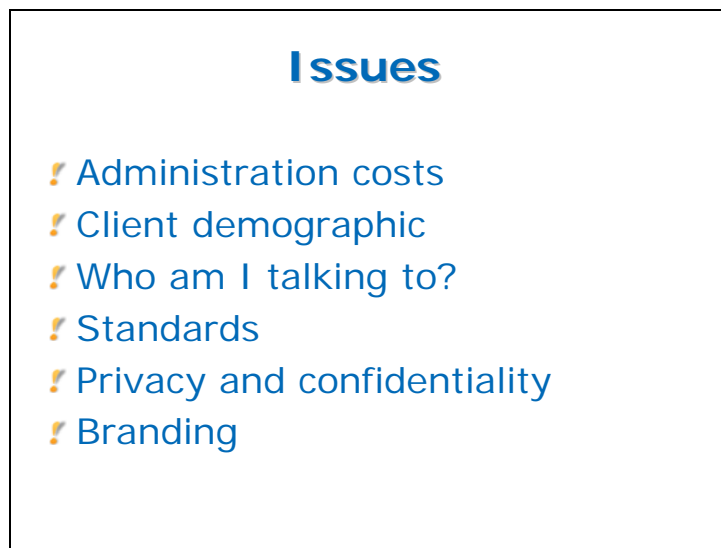
What involvement is requested of the collaborative partners eg AskNow obligates a library to support users from outside its primary user community. Some US state wide collaboratives are set up so libraries can answer questions from their own local patrons first and then if the enquiry isn't picked up, it will be answered by another library in the cooperative.

How long will the cooperative operate eg just development opportunity? AskNow started as a 12 month pilot, which extended to 18 months and then was deemed to be ongoing with 2 year Business Plans.

In regard to required resources, in AskNow we have a formula based on the size of the library for the number of operator hours and the division of software licence fees. However management and development is also an essential part of the service: in our latest costing exercise NLA contributed over 80% of the administration. This is a situation we would like to review in the next version of the Business Plan.

It's necessary to assess if all partners can deliver on agreed outcomes and shared accountabilities incl economic contributions. When we developed a trial of Instant Messaging in AskNow, in Nov 2006, we realised from initial proposals that not all partners were in a position to contribute or deliver on more than moral support. However the NLA decided to go solo in the development phase, partially to facilitate infrastructure development, and then included those partners who had the necessary staff and IT resources a few months later. It was a great success for those partners but still not all state libraries were in a position to take part.

Evolution and innovation have to be accepted as the norm, as is renewing the service mandate. This means experimenting with technologies to learn what applications are appropriate for what tasks and what reference environments. In the case of AskNow we also know we have to continually evolve to remain relevant to target audiences, such as regional and remote patrons. I'll discuss later how we've recently embarked on an online marketing campaign to meet clients where they are – on their websites and after their Google and Yahoo searches.



**Here's a selection of issues that should also be considered as part of the decision making process in considering whether to enter into a collaborative:**

**Who pays, how much, when and how**

**Do you have an agreed set of patrons to target? Our service is for general reference with an emphasis on quick, immediate reference and a triage model of referral for more complex enquiries that are answered by email.**

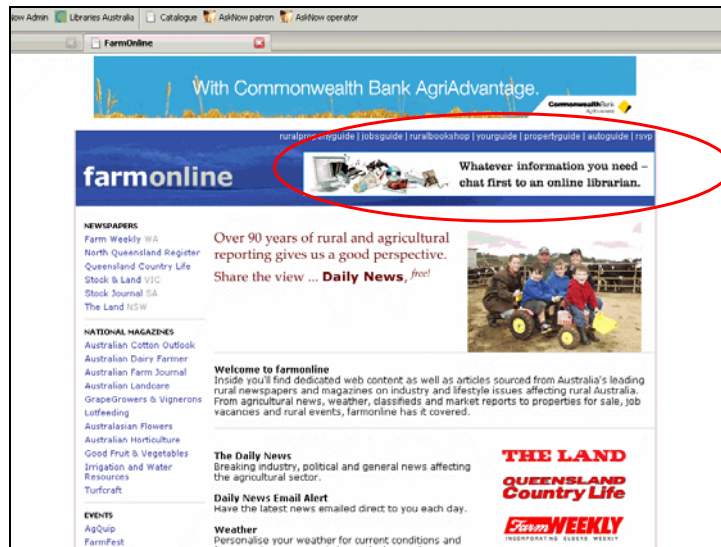
**Will your patrons understand the concept of the collaborative? You may have to focus effort on meeting an expectation that they are dealing with a particular person or library in their local area etc.**

**As with any reference service, quality assurance measures will need to be defined and managed. In chat reference we have a distinct advantage in being able to scrutinise transcripts of all transactions easily and immediately using the chat software.**

**Of course, with an audience such as yourselves, I need not emphasise any further the imperative that privacy and confidentiality for patrons and staff alike are not compromised through working as a collaborative.**

**How will the service be branded and promoted? Eg we at the NLA have a different focus in our promotional strategies to a public library in the Northern Territory.**

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Two weeks ago the NLA launched its first online marketing campaign with paid advertising for AskNow on Google and Yahoo and a two month banner ad on the rural website, Farmonline.

We commissioned Zoo Design at Fyshwick to develop a new creative for these online banners, our new webpage, flyers, posters, logos etc. The art design work has been distributed to state library partners to print and use online in the way that suits their library and the public libraries in their state.

### **Characteristics of successful collaboration**

- ! Part of a continuous collaborative culture
- ! Produces increased public value
- ! Of mutual advantage
- ! Outcomes are paramount
- ! Administrative stability
- ! 'Get started' mentality

#### **Factors that mark a successful collaboration:**

**There is an ongoing culture of collaboration eg NSLA and Reimagining reference project + common internet links + del.icio.us accounts**

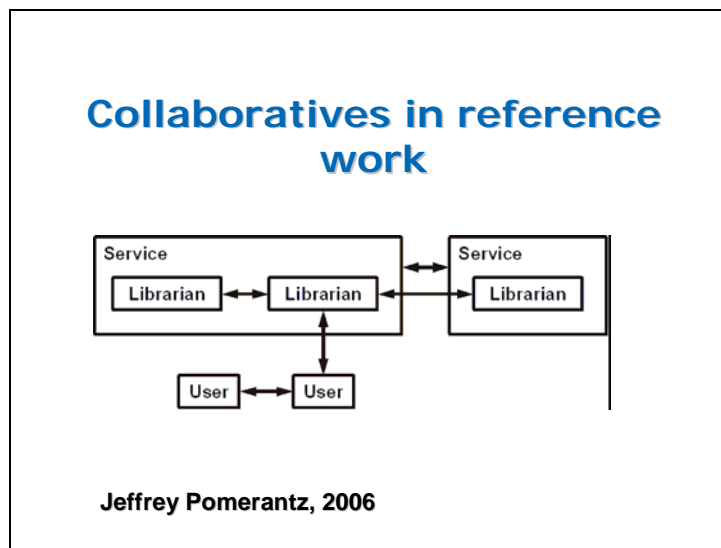
**Values are defined and partners agree on the tasks ahead and preferably have specific timelines and milestones**

**Successful collaboration is where there is mutual advantage for all. Power imbalances are diplomatically handled and force is avoided, as it can either destroy collaboration or undermine the intent.**

**Agreed outcomes are fundamental and paramount. It may be a threat initially in working through how to collaborate without losing turf but agreement on outcomes should be the focus. Also, remember short-term successes help the process and make the purpose more tangible.**

**Administrative stability for collaborative reference services is being debated in the US at present. It has to be a managed process: who and how? Librarian In Black (Sarah Houghton-Jan) on her blog last week bemoaned the lack of ongoing funding for administration of the Californian libraries' statewide chat reference service – their software costs are secure but they lack a coordinator and as she says 'the project continues its slow death with a lack of organisation, training and PR'.**

**Sometimes it may be best to 'get started' and see what ensues rather than wait for full agreement which may never eventuate. Waiting for perfection may mean missed opportunities.**



This diagram is from an article by Jeffrey Pomerantz titled ‘Collaboration as the norm in reference work’ published in *Reference & User Services Quarterly* last year.

Collaborations between librarians, services and users are represented by the two-way arrows.

#### Collaboration happens

Between librarians within the library ie colleagues collaborating on answering a question

Across libraries where assistance is requested eg w AWM.

Or the most familiar form of collaboration between the librarians in reference work is also the simplest: the referral. The librarian may simply tell the user to go to another service (with contact information in hand, one hopes) or the librarian may make contact with that other service on the user’s behalf.

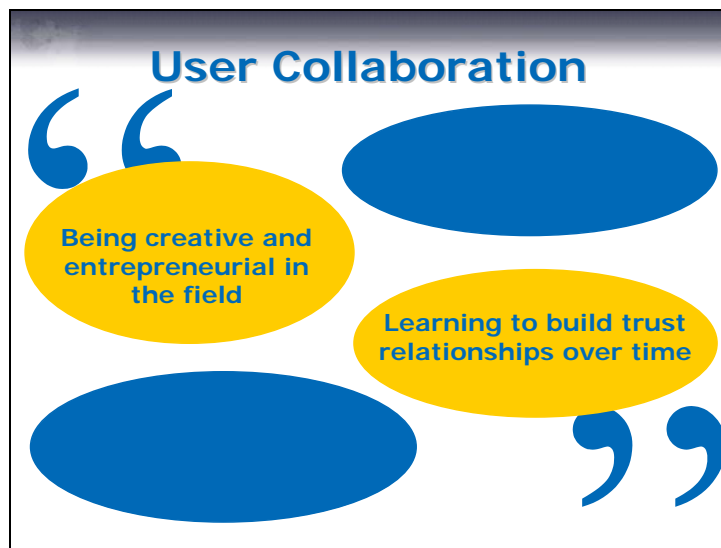
Of course it also happens between the librarian and the user

And finally it happens between users and, excitingly, potential users.

Reference has always been a collaborative effort between the librarian and the user but now we’re moving more towards reference work being a community exercise.

Another notion that comes into play here is that of distributed credibility: that a community of librarians may contribute a fuller and more complete answer than any one single librarian might be able to do. Members of the community pool their knowledge and thereby replace “an individual judgment with a collective intelligence.” (Nicholas Burbules in *Library Trends* 2001).

Variables in play here are the complexity of the enquiry and time frame. In 2001 Burbules probably wasn’t contemplating the power of social networking technology to extend the community of users ie bottom of diagram.



And so we've moved into the emerging area of collaborative opportunities ie with our patrons.

This is where librarians have to start thinking how to manage outwards (or downwards in the previous diagram) to where our users are collaborating with each other.

We need to be creative and entrepreneurial in the field of social networking. It could be a mash up of search and social networking where products such as Rollyo enable you to explore other people's search results. Or Gabbly where you can join a group of people chatting about a web page. Or even develop the old Stumpers concept now known as Project Wombat and hosted by the Project Gutenberg people.

It's all about trust and that takes time. I think by now we probably all know at least one person who is a contributor to Wikipedia – and guess what, they're not fraudulent or ignorant people (usually)!

And ultimately it's all about sharing our knowledge in new ways.

In conclusion,

In our experience, provided we ask the right questions while we set up collaboratives and know what success means in that context, the whole can be greater than the sum of its partners.

**Thank you!**

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