2013 Task Force on Statewide Collaborative Reference Service
Recommendations to LSTA Council

Summary

State Librarian MaryKay Dahlgreen formed a Task Force in April 2013 to look at the statewide collaborative reference service and make a recommendation to the LSTA Council regarding the service. The Task Force examined current information needs of Oregonians and methods of collaborative reference service.

Task Force Recommendations:

- Continue to operate Answerland, Oregon's existing statewide collaborative reference service.
- Incorporate the creation of self-service tools for libraries and patrons with Answerland's existing activities.
- Reduce Answerland's dependence on LSTA funding over 5 years.
- Increase funding from Oregon libraries for Answerland over 5 years.
- Identify a new fiscal agent for Answerland.
- Create a transition team to communicate the changes to Oregon libraries, clarify a funding model, and identify a new fiscal agent and host.
- Use LSTA funds to raise awareness of LSTA-funded programs.

Background of Statewide Collaborative Reference Services

The Oregon State Library has a statutory responsibility to provide for statewide cooperative reference services as outlined in ORS 357.206 and 357.005 (2)(d). This has been reflected in the former Oregon Reference LINK program (1994-2003) and now in L-net/Answerland (2003-2014). The statewide virtual reference service started as Answerland in 2003. In 2004 it was changed to L-net. In August of 2013 it was changed back to Answerland and a new website was launched that reflects a revised service model. "Answerland" and "L-net" will be used interchangeably in this report.

In the current model, LSTA provides about $294,000 annually to a fiscal agent to operate the program, including funds for two full-time staff to coordinate the program. Oregon libraries contribute in-kind staffing, logging 3,780 hours of reference service in 2012-13. Individual volunteers managed by the fiscal agent contributed an additional 2,146 hours of reference service in the same period.

At Multnomah County Library, the current fiscal agent for Answerland, paying for an experienced librarian for libraries' in-kind contributions would cost $158,155.

Answerland has been successful. The service receives over 35,000 questions by live chat, email and text messaging annually. A significant percentage of questions were asked by kids and teens seeking homework help. Over 200 people working in 45 Oregon public, academic and special libraries contribute to the service regularly.

In 2009, a plan was enacted by the Oregon State Library Board of Trustees that allows OSL to charge Oregon libraries to support the collaborative reference service. Since then, the OSL Board

of Trustees elected not to recover costs, citing economic reasons for this decision. Details of the current plan are outlined in OAR 543 Div 60 subsection 0070.

In 2013, L-net turned 10 years old, a milestone that prompted reflection statewide. Multnomah County had initially agreed to act as fiscal agent for a pilot project, but decided not to continue that role after June 2014. At the same time, it was anticipated that LSTA funding could be significantly reduced or eliminated in the future. These issues provided the opportunity to reconsider the model for statewide collaborative reference in Oregon.

Task Force Created by State Librarian, MaryKay Dahlgreen

Rather than automatically continuing the current model with a new host, the State Librarian created the 2013 Oregon State Library Task Force on Statewide Collaborative Reference Service to answer the following questions:

- What are the needs of Oregonians in regards to reference and information services?
- Which needs are most important to be addressed on a statewide level?
- How can Oregon libraries, working together, best meet the most important needs, using available resources?

The Task Force was formed with librarians representing organizations of all types, sizes, and locations across the state.

Members are:

Jenny Berg, Director, McMinnville Public Library (Task Force Chair)
Marie Baldo, Director, Hermiston Public Library
Bonnie Brzozowski, Reference Librarian, Corvallis-Benton County Public Library
Sue Burkholder, Trustee, Oregon State Library
Cathy Camper, Evolving Homework Grant Coordinator/School Corps Librarian, Multnomah County Library
Darci Hanning, Technology Development Consultant, Oregon State Library
Valery King, Social Sciences/Humanities and Government Information Librarian, Oregon State University Libraries and Press
Stuart Levy, Teacher-Librarian, Inza R. Wood Middle School, West Linn-Wilsonville School District
Jen Maurer, School Library Consultant, Oregon State Library
Emily Miller-Francisco, e-Resource Systems & Web Coordinator, Southern Oregon University Hannon Library
Laura Orr, Law Librarian, Washington County Law Library
Pierina Parise, SLIM-Oregon Program Director, Emporia State University (Portland branch)
Donna Reed, Director, Portland Community College Library

Also present at meetings were:

MaryKay Dahlgreen, State Librarian, Oregon State Library
Mary Forst, Confluence Center, as facilitator

Caleb Tucker-Raymond, Answerland Coordinator, Multnomah County Library, as consultant

Information gathering by Task Force

It was important for members of the Task Force to understand that the purpose was not to "save Answerland" but to find the best method for statewide collaborative reference service. The purpose was to design the future of reference service to Oregonians. In order to envision where we wanted to go, we thought it valuable to look at current reference trends. We discussed the following:

- How has reference changed in the last 20 years?
- What do our experience and the research tell us are trends?
- What are our predictions for the future?
- What are the tools now? What will they be?

While there is a shared sense that demand for reference traditional services has decreased in recent years, state and national data demonstrate that demand for reference is growing in smaller public libraries (of which Oregon has many) and in community colleges.

A very important part of the process was to identify the information needs of Oregonians best served by librarians. After members brainstormed, the needs were prioritized based on the following criteria:

- Is it a need that libraries are uniquely able to meet?
- Is it a crucial need for the user?
- Does it have a big impact in terms of value for the benefit of or number of people served?
- Is there already a system in place to meet this need?
- Does the need recur among different user groups?
- Does it encompass the needs of users of multiple types of libraries?

Information needs of Oregonians

The Task Force utilized members' expertise in providing reference service to identify the current needs of Oregonians. Librarians across Oregon were asked for input regarding the met and unmet needs of library patrons and non-library users. The needs were then examined using the above criteria.

The needs were discussed in the context of how well they would serve various constituents - users of academic, public and school libraries, as well as Oregonians not currently served by a public library.

<u>Most important reference and information needs of Oregonians</u>:

- Help Oregonians develop information literacy skills to find, evaluate, and use information.
- Provide support for and access to resources around government information - including voting, citizenship, government agencies, and working with local agencies to meet needs.

- Raise awareness of statewide and collaborative library services such as statewide databases, OSLIS, Library2Go, shared catalogs, and Answerland.

Other important reference and information needs of Oregonians:

- Create a technical infrastructure to make it easier for patrons and library staff to use library resources (e.g. catalogs, websites, databases, discovery layers).
- Provide help for making the most of existing library resources, such as the integrated library system, shared catalogs such as Summit, placing things on reserve and interlibrary loans.
- Raise awareness of local library services such as databases, materials available for loan, programming and meeting spaces available.
- Provide support for homework and scholarly research, including help with a research strategy, citation management and plagiarism research.
- Make online library websites, tools and resources accessible and easy to use with cell phones and mobile devices.
- Provide trustworthy information and referral services to assist patrons around issues of health, mental health, social services, taxes and housing.
- Provide support for and access to subject-specific tools and topics.
- Provide support for and access to legal research resources such as family law (e.g. divorce), intellectual property law (e.g. copyright), current legislation, legislative histories and public policy research at all levels.
- Improve online library websites, tools and resources to provide positive, intuitive online experience with library resources.

Methods of Collaborative Reference Services

Once needs were identified the Task Force studied various methods of providing collaborative reference services to meet those needs. The following methods were identified:

Virtual Reference

Virtual Reference services allow patrons to connect to library staff online, through tools and services such as live chat, email, and text messaging.
Examples: Answerland, www.answerland.org

Information Portal

A portal is a website that acts as a gateway to various resources, such as licensed databases, digital libraries and collected web resources.
Examples: OSLIS, www.oslis.org, Libraries of Oregon, www.librariesoforegon.org, NCLive, http://nclive.org/.

Self-Service Tools

Self-service tools are reference tools to improve patron access to information. A self-service tool could be a part of a library website or portal.
Examples: Subject guides, such as http://corvallis.libguides.com/localhistory, topics listed on Plinkit sites and Libraries of Oregon, http://librariesoforegon.org/home?quicktabs_3=1#quicktabs-3

Collective Purchasing
Collective purchasing or licensing allows libraries to save money by sharing the costs of electronic resources.
Examples: Statewide database licensing (Gale databases), Library2Go, www.library2go.lib.overdrive.com.

Communities of Practice
A community of practice is a formal or informal group of professionals working together on common problems and exchanging ideas.
Examples: Information Literacy Advisory Group of Oregon, http://ilago.wordpress.com.

Directory of Experts
A directory of experts would allow patrons access to a subject expert without having to go through the library as an intermediary.

Face to Face
Face-to-face services are delivered by library staff directly to patrons.

Each method of service was discussed in terms of how well it met each need, using the following criteria:

- Is it easy to accomplish?
- Could it be done collaboratively statewide?
- Is there something to gain through collaboration?
- Is it cost effective?
- Will partners be able to make a 3- to 5- year commitment?
- Is it possible for Oregon libraries of all types to participate?

The complete results of this exercise are included in the appendix.

Recommendations

1. Chosen model
The Task Force concluded that a combination of collaborative virtual reference and self-service tools will best meet the most important reference and information needs of Oregonians.

Oregon's existing virtual reference service, Answerland, should continue. In addition to meeting Oregonians' needs, Answerland already has a vibrant community of participants, and is named as an activity in Oregon's LSTA 5-year plan for 2013-17.

In addition, Answerland should coordinate the creation of self-service tools such as videos and FAQs to bring added value to the program and to Oregon libraries. These could be created by Answerland participants and distributed statewide for libraries to share with patrons.

2. Funding
The Task Force was also charged not simply with meeting Oregonians reference and information needs but with meeting those needs "using available resources."

The Task Force acknowledged the need to transition Answerland away from dependence on LSTA funds in order to provide a stable future for the program. LSTA funds should continue to be used to support Answerland in part, in order to subsidize participation by the smallest Oregon libraries.

Oregon Administrative Rule 543-060-0070 requires that Oregon libraries contribute to the funding of a statewide cooperative reference [as a part of the process used for paying for statewide licensed databases].

The value added by the new self-service tools will be an added incentive for Oregon libraries to fund Answerland up to 75% by fiscal year 2017/2018.

The Task Force requests that LSTA fund Answerland at $294,000 for the upcoming year, 2014-15. In the next 3 years, the percent of funds from LSTA should decrease, and funds from libraries increase. Annually, the overall budget would be proposed by the Answerland advisory board, reviewed by the LSTA Council and approved by the Oregon State Library Board of Trustees.

2014/15 - LSTA funds 100%
2015/16 - Oregon libraries fund 25%; LSTA funds 75%
2016/17 - Oregon libraries fund 50%; LSTA funds 50%
2017/18 - Oregon libraries fund 75%; LSTA funds 25%

3. Fiscal agent
Because Multnomah County Library will no longer be fiscal agent, a new host for Answerland needs to be identified as soon as possible. For expediency, the State Librarian should identify a new fiscal agent for the service.

Using a fiscal agent is not the only way to host Oregon's collaborative reference service, but it is the best option going forward. Hosting the collaborative reference service at the Oregon State Library is challenging because the legislature would have to approve any new positions created to support the program. Contracting with an individual would be difficult because Answerland currently has two full-time staff.

4. Transition team
The State Librarian should convene a transition team, which will:

- Create a communication plan to share information about Answerland's financial situation and to engage decision-makers in a conversation about how to create a sustainable financial model for this valuable service. This should be a top priority.
    - This work should begin as soon as possible.
    - The Task Force recommends focusing on all library types.
- Create a new business plan based on feedback from the library community, and communicate the plan widely.
- Recommend a budget and a model for governance of the new program.

5. Raise awareness of library services
The Task Force identified the need to raise awareness of library services at both the local and the statewide levels.

Any program or service must be promoted in order to be successful.

The Task Force recommends that the Oregon State Library use LSTA funds to promote programs funded by LSTA, as allowed by the Institute of Museum and Library Services. A promotional campaign highlighting Answerland, statewide licensed databases, OSLIS and other LSTA-funded programs would be far more efficient and far-reaching than what any individual program could do to promote itself.

Appendix

Methods of collaborative reference services and needs each meets.
For each method, needs are sorted by the number of times they were rated 'good' methods for meeting that particular need, then by the rank of that need.

Virtual Reference

Rank	Need	good	possible
2	Provide support for and access to resources around government information, including voting, citizenship, information about government agencies and working with local agencies to meet needs.	12	2
6	Provide help for making the most of existing library resources, such as the integrated library system, shared catalogs such as Summit, placing things on reserve and interlibrary loan.	12	2
7	Provide support for scholarly research, including help with a research strategy, citation management and plagiarism research.	12	1
9	Provide support for and access to subject-specific resources	12	0
1	Help students develop information literacy skills to find, evaluate and use information	8	6

Information portal

Rank	Need	good	possible
2	Provide support for and access to resources around government information, including voting, citizenship, information about government agencies and working with local agencies to meet needs.	10	4

13	Provide support for and access to resources around personal career development, including job searching, resume writing, career guidance, the GED and help patrons to find information about and prepare for college.	11	2

Self-service tools

Rank	Need	good	possible
7	Provide support for scholarly research, including help with a research strategy, citation management and plagiarism research.	12	3
2	Provide support for and access to resources around government information, including voting, citizenship, information about government agencies and working with local agencies to meet needs.	10	2
5	Make it easier for patrons and library staff to use databases	10	2
13	Provide support for and access to resources around personal career development, including job searching, resume writing, career guidance, the GED and help patrons to find information about and prepare for college.	10	3
1	Help students develop information literacy skills to find, evaluate and use information	9	5
6	Provide help for making the most of existing library resources, such as the integrated library system, shared catalogs such as Summit, placing things on reserve and interlibrary loan.	8	3

Collective purchasing

Rank	Need	good	possible
4	Make online library websites, tools and resources accessible and easy to use with cell phones and mobile devices.	12	0
5	Make it easier for patrons and library staff to use databases	11	3
10	Improve online library websites, tools and resources using user experience design (UX).	11	2
9	Provide support for and access to subject-specific resources	8	3

Communities of practice

Rank	Need	good	possible
4	Make online library websites, tools and resources accessible and easy to use with cell phones and mobile devices.	8	3
9	Provide support for and access to subject-specific resources	8	4
10	Improve online library websites, tools and resources using user experience design (UX).	8	3

Directory of experts

Rank	Need	good	possible
9	Provide support for and access to subject-specific resources	9	2
7	Provide support for scholarly research, including help with a research strategy, citation management and plagiarism research.	8	3

Face to Face

Rank	Need	good	possible
2	Provide support for and access to resources around government information, including voting, citizenship, information about government agencies and working with local agencies to meet needs.	10	2
1	Help students develop information literacy skills to find, evaluate and use information	9	3
13	Provide support for and access to resources around personal career development, including job searching, resume writing, career guidance, the GED and help patrons to find information about and prepare for college.	8	2