



# Managing a Virtual Reference

How

*How did we get started? With determination and teamwork. How do we manage such a large project now? With dedication and communication.*



by Peter Bromberg

# Statewide Service: Q and A NJ Works

**N**ew Jersey's live virtual reference service, Q and A NJ, is available on the Web 24 hours a day, 7 days a week. It's collaboratively staffed by more than 250 librarians from 33 participating libraries. Q and A NJ is funded by the New Jersey State Library with federal Library Services and Technology Act (LSTA) funds and managed by the South Jersey Regional Library Cooperative (SJRLC). Q and A NJ grew out of a desire to create a highly marketable library service, and it's developed into a unique, collaborative, statewide virtual reference service, helping more than 4,000 satisfied customers a month. How'd we do it? Well ...

In this article, I will chronicle the genesis of the Q and A NJ project, as well as the strategies we've employed to meet the challenges of day-to-day management, scaled growth, and quality control. I became involved in September 2000, as a project manager representing the Camden County Library. At that time, I supervised the reference department at Camden County, and we were one of the original 10 libraries that signed on to help plan and eventually staff the as-yet-unnamed live reference project. In June of 2001, I joined SJRLC as its program development coordinator, and immediately became much more deeply involved with Q and A NJ as the regional co-op geared up to launch the service to the public that October.

## **Q: How Did It All Begin?**

**A:** The seeds of Q and A NJ were sown at a "Leap Forward" planning day that SJRLC held on Feb. 29, 2000. SJRLC is a multi-type library cooperative based in Gibbsboro, N.J., and it serves over 560 libraries in the southern seven counties. As one of the four co-ops in the state, SJRLC has a strong role creating continuing education and staff development opportunities for the libraries that we serve. Our Leap Forward planning day was meant to help keep SJRLC on course in providing what libraries needed, but it was also designed as a day that would generate creative new ideas in an out-of-the-box environment. A select group of library policy-makers,

team members, and original thinkers from around the region attended. Among other things, they said they would like SJRLC to develop a highly marketable service; one that would wow customers and also help libraries to recruit and develop staff.

When the day ended, attendees compiled the results and later presented strategies for meeting the group's needs to SJRLC member libraries at the June 2000 meeting. Those strategies included:

- Go where the people are.
- Offer services that will surprise and delight our users. Put them front and center on our Web pages and publicize them.
- Build a marketing campaign around one amazing service.
- Do customer satisfaction surveys. Solicit and respond to customers' suggestions.

After the June meeting, Karen Hyman, the executive director of SJRLC, continued thinking about the ideas that we had generated in the planning session. Back in 1999, she had applied for an Institute of Museum and Library Services (IMLS) grant to start an experimental virtual reference service based on a Microsoft NetMeeting platform. The grant was not awarded, but that was starting to

look like a blessing in disguise. A live, virtual reference service would go a long way toward meeting many of the stated goals of the Leap Forward day, and LSSI had recently come on the market with its software, Virtual Reference Desk (VRD). The software was specifically tailored for libraries doing virtual reference, and it offered a much more elegant solution to the technical challenges than NetMeeting had. VRD allowed for real-time interactive reference over the Internet but required no special software on the customer's computer.

Hyman sent invitations to selected member libraries asking them to come together to discuss the issues involved in designing and implementing an online, real-time reference service, and to investigate the possibility of creating a service as a pilot project in South Jersey. The meeting took place on Sept. 27, 2000, and LSSI's Steve Coffman was on hand to offer his perspective, as well as to conduct a live demonstration of the VRD software.

The next month, the SJRLC board voted to fund the start-up costs of this pilot project. Libraries that had attended the demonstration meeting were invited to join the project, and 10 of them signed on. SJRLC agreed to pay the cost of the software, training, and service fees, and to coordinate training, assist with publicity, and ensure and facilitate all tech-

nical support. In exchange, the libraries were asked to commit 5 to 10 hours per week to the fledgling project, and to answer online questions from customers of any participating library. Each library was also asked to appoint a project manager to represent its interests on the planning team. I was appointed to represent Camden County Library.

In November, the planning team had its first monthly meeting and immediately started policies, procedures, guidelines, and service standards for the new LiveRef project. The group norms that we agreed upon that day are the ones that still guide our planning team today. The team agreed to: make and abide by systemwide decisions, choose quality of service over quick expansion, focus on marketability, and develop a coordinated approach to marketing and publicity. We chose LSSI's Virtual Reference Desk software because it had performed well at the demonstration, and also because it was the only viable product on the market at the time. We were off and running!

### Q: How Long Did It Take?

**A:** Between November 2000, and April 2001, we LiveRef project managers held monthly face-to-face meetings and the occasional online meeting, in which we

hammered out all of the details involved in creating and developing a new service. We also created two project listservs and a shared calendar to facilitate communication between meetings. After a fun brainstorming session, we chose "Q and A NJ" as the official name of the project. A professional designer was hired to create graphics, which were incorporated into the Q and A NJ Web page and all subsequent marketing materials. Steve Coffman returned with Kay Henshall to formally train the first class of virtual librarians. After the training, we held online practices where we honed our skills with the software and learned to operate in the virtual environment.

Although the service had not yet gone live, libraries across the state were beginning to express interest in being involved. In April 2001, eight more joined. Two of them were based in South Jersey, but the other six, including the New Jersey State Library, were from Central Jersey. New Jersey Nightline, a grant-funded service that provided after-hours reference service, also agreed to partner with us by answering questions online. Norma Blake, our new state librarian, liked what she was seeing and said, "Make it statewide!" She asked SJRLC to expand and manage the project, and LSTA funding soon followed.

This was about the time that I left my local library and began to work at the

South Jersey Regional Library Cooperative, so I became even more involved with this growing project. At SJRLC, we began to recognize the need for a full-time project coordinator, and the planning team started brainstorming desired characteristics. In the summer of 2001, we began interviews. Online practices were in full swing as Q and A NJ librarians got their virtual footing in this new reference environment. We agreed on staffing norms and drafted a go-live schedule. Initial service hours would be 1 p.m. to 11 p.m. Monday through Thursday and 1 p.m. to 5 p.m. on Fridays.

### Collaborative management becomes more challenging with each new addition to the team.

In August we were lucky enough to hire Marianne Sweet as Q and A NJ's full-time project coordinator. With her on board, a marketing plan that included distribution of bookmarks, stickers, posters, and press releases was put in place. An

online manual was created, core competencies were developed, many loose ends were tied up, and plans were made to go live to the public on October 1. A 2-week dress rehearsal began in mid-September, which allowed us to test our theoretical schedule, and to test the Virtual Reference Desk software under a heavier load. Family, friends, and colleagues were invited to log on to Q and A NJ and post their questions. After 2 weeks of successful practice, Q and A NJ went live to the public on Oct. 1, 2001.

In our first month, we responded to 451 questions, which in retrospect is a relatively small amount. We slowly began marketing the service with press releases and bookmarks, but held off on a full-scale marketing blitz for two reasons: First, we had agreed to choose quality over fast growth, and we wanted to make sure that all systems were go before building a big customer base. Second, we were planning to expand the service in January 2002 to be available 24/7 by outsourcing the evening and weekend hours to LSSI's Web reference center. It made more sense to delay the big marketing push until January, when we could synergistically announce "24/7!" in addition to "Live on the Web!"

## PROJECT GROWTH TIMELINE

September 2000    October 2000    November 2000    December 2000    January 2001    February 2001    March 2001    April 2001    May 2001    June 2001    July 2001    August 2001    September 2001    October 2001    November 2001    December 2001    January 2002    February 2002

**September 27, 2000**

Selected librarians meet to investigate possibilities and to see a demo

**November 15, 2000**

First 10 libraries join the "LiveRef" project

**November 30, 2000**

First project manager planning meeting

**October 19, 2000**

SJRLC board votes to fund the start-up costs of a pilot virtual reference project

**December 2000–February 2001**

Set up project listserv; shared Yahoo! calendar  
Begin structured practice sessions  
Draft service policies

**April 2001**

Eight more libraries join the project  
Apply for LSTA funding

**March 2001**

Project name is chosen: Q and A NJ  
Create online manual  
Co-located links to library Web pages and service policies

**June–July 2001**

Receive LSTA funding  
Q and A NJ graphics professionally designed; Web site up  
Interview candidates for a full-time project coordinator  
Agree on staffing norms  
Draft schedule

**August 2001**

Hire Marianne Sweet as project coordinator  
Set unanswered question referral procedures

**September 2001**

2-week dress rehearsal

**October 2001**

Q and A NJ begins serving the public

**November 2001**

Seven more libraries join Q and A NJ

**January 2002**

Service hours expand to 24/7  
Big marketing push:  
Usage grows by 500 percent

**February 2002**

Seven more libraries join the project

The project continued to grow that fall as seven more public libraries from Central and North Jersey joined the team. By this time, Sweet had taken over all training, which saved us the expense of bringing in LSSI trainers. On Jan. 28, 2002, with 26 participating libraries, Q and A NJ expanded its service hours to 24/7 availability. We also began marketing in earnest. We sent press releases to local papers. Participating libraries approached local organizations and businesses, including Borders and Barnes & Noble, asking them to distribute bookmarks. Each participating library had a top-level link to a standard Q and A NJ banner ad on its Web page—no buried links! Our expanded hours and corresponding marketing campaign showed immediate results. Usage shot up from 100 questions per week to 100 questions per day almost overnight. We haven't stopped to catch our breath since.

### Q: How Do We Manage Such a Large Project?

**A:** Remember that Q and A NJ had responded to 451 reference questions in its first month. A year later, with 33 participating libraries and more than 250 librarians on board, our volume had grown to over 4,000 questions a month. How does a project with such a wide scope stay on track day after day? There are many factors that contribute to our success: the vision and leadership of SJRLC executive director Karen Hyman; the support and encouragement of state librarian Norma Blake and director of library development Carol Nersinger, our champions at the State Library; the skill and dedication of the project managers and the librarians who staff the service; the skill, smarts, and seemingly unlimited energy of our project coordinator, Marianne Sweet; and the original work of Kathy Schalk-Greene, SJRLC's previous program development coordinator, in whose footsteps I am pleased and honored to follow. In addition to these personnel factors, we've built a number of positive behaviors into our project management structure. Here are our secrets:

**Constant Communication:** Since the beginning, the project managers have had monthly face-to-face meetings to develop and refine policies and marketing plans, and to address problems and challenges as they arise. We also use two listservs to stay in continual contact with each other. The smaller, less active listserv is used by project management staff to discuss policy-level issues that may arise between meetings. The larger, more active list goes out to every librarian involved with Q and A NJ, and is used to share strategies, discuss current question trends, and swap shifts. Marianne Sweet maintains a continually updated online manual, which we use as a virtual filing cabinet. All information relevant to Q and A NJ project staff is in that manual: the schedule, links to library catalogs and remote access databases, ready reference links, policy and procedure documentation, tip sheets, meeting minutes, marketing materials, and more.

**Training and Practice:** Before staffing the service, all Q and A NJ librarians attend 1 full day of training. Sweet travels around the state to conduct these classes at conveniently located labs (and she teaches refresher classes as needed). While it is impractical for her to go to each of our 33 libraries for training, she has been to many of them, and she works with the libraries to schedule trainings at central locations. The full day of training is followed by scheduled and unscheduled online practices, with librarians evaluating themselves against a checklist of core competencies. The software allows us to easily set up private practice queues that perfectly reflect the Q and A NJ reference environment, except that the customers consist of family, friends, and colleagues rather than the general public. Librarians also use the listserv to schedule informal practices with each other on an ad hoc basis.

**Transcript Analysis and Privacy:** Every Q and A NJ transaction generates three transcripts: One goes to the customer, one to the librarian, and one to

Sweet. Once a week, Sweet sends each project manager copies of all reference transcripts that involved their librarians. Project managers examine the transcripts and meet with their staff to review quality, identify best practices, and address service issues. At our monthly meetings we examine transcripts en masse, with identities stripped, to evaluate quality and to identify and institutionalize best practices. This model preserves the basic privacy of each librarian's transcript, while still allowing enough transparency for projectwide and library-specific quality control.

**Customer Feedback:** At the end of each Q and A NJ session, every customer sees a pop-up survey that we use to solicit feedback, collect demographic information, and gauge satisfaction levels. We kept the survey short and simple, which might account for the relatively high response rate, ranging monthly from 20 to 35 percent. Each month, we compile and analyze customer satisfaction, suggestions, and demographics. This information keeps us in touch with our service population. We know our customers.

**Marketing and Scaled Growth:** From the beginning, we have actively promoted Q and A NJ, using bookmarks and posters that have a simple, unambiguous, inviting message: "Got a Question, Get a Live Answer." We did one large-scale, coordinated push in the press, when our service hours expanded to 24/7. That exposure resulted in a 500-percent growth in business, bringing demand in line with our service capacity. Since that time, we have been

cautious not to over-market, doing a good job of scaling our growth in usage to our capacity to provide service.

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If these elements represent the structure of the project, then the foundation is the shared culture that we have developed among Q and A NJ librarians. Perhaps it is because we started as a self-selected group of librarians who wanted to do something new and different, but from the beginning, there has been a shared culture of risk-taking, trust, and service to our customers, as well as a sense of fun and excitement. All of the highs and lows, all of the tough decisions that have been made, have taken place against the backdrop of this shared culture, and that, as much as anything, has allowed us to grow into a unique, service-focused collaborative. Our 250 librarians are distributed across a large geographic area, and most of them have never met. A shared culture is important to the success of any organization or project, but its importance is exponentially magnified in a distributed, multi-organizational project like ours.

### Q: Where Are We Now? Where Are We Going?

**A:** Our service is currently handling more than 4,000 questions a month, and it continues to see significant growth. Last October we began a state-library-funded partnership with Tutor.com to offer live tutoring help between the hours of 2 p.m. and 10 p.m., 7 days a week. This has increased our under-18 market, and our Tutor.com traffic, while small, has shown

600 percent growth in the first 3 months, largely through word of mouth.

One of the biggest challenges we now face is continuing to increase our service capacity to match the ever-growing customer demand. We are still bringing on new libraries to help us staff the service, but collaborative management becomes more challenging with each new addition to the team. Our monthly meetings started with 12 people around a table and now we're up to 36. There is a very different group dynamic with 36 people, and time constraints make it harder to have in-depth discussions with everyone being given a chance to speak. While we continue to have these project manager meetings, we've recently begun to do more break-out group discussions. We form small groups of five, which allows more opportunity for everyone to offer input on the question at hand. The groups have 30-45 minutes to discuss and record their thoughts, then they report back a consensus or summary of ideas, and a full discussion takes place based on the information generated.

We are beginning to explore the possibility of hiring librarians part-time to work after hours and/or on weekends. This is

motivated by two factors: While LSSI's Web Reference Center has generally done a good job for us, we think that staffing more hours with New Jersey librarians gives us more of a handle on integrated quality control. Also, creating virtual reference positions for New Jersey librarians serves one of our original goals—providing staff development opportunities. But if we do that, combining in-library, local freelance, and outsourced staff will present a new host of challenges.

**We've even gotten feedback from a grandmother who said, 'I'm just ecstatic about the whole darn thing.'**

Perhaps one of the biggest challenges we now face is determining the future sustainability of Q and A NJ. Business is booming. In addition to customer demand, we also know that there is a high level of customer satisfaction. Our feedback has been consistently positive. Every day we receive comments from customers, such as this one from a self-described "house grandmother" who offered, "I'm just ecstatic about the whole darn thing." People use Q and A NJ. People love Q and A NJ. But as a volunteer-staffed, grant-funded project, we now face the challenge of transitioning from a temporary, experimental project to an ongoing statewide service.

One way or another, I am sure that we'll meet these challenges. As our customers are increasingly living their lives online, I am convinced that libraries must move toward having an increasing Web presence. Librarians have always been in the business of removing barriers between people and information. Offering live reference on the Web is only a natural expression of this core professional value.

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## For More Information

For those interested in more information, I've made a special supplemental Web page for *CIL* readers at <http://www.qandanj.org/cils>. This page contains:

- List of participating libraries
- Customer feedback form
- Selected customer feedback
- Core Competencies for Q and A NJ reference work
- Reference session evaluation checklist
- Project coordinator job description
- Link to online manual
- Sample schedule
- And more ...