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A Year of Virtual Reference: What we Learned

Abby Juda

Ithaca College, ajuda@ithaca.edu

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A Year of Virtual Reference: What we Learned

Abby Juda
Ithaca College

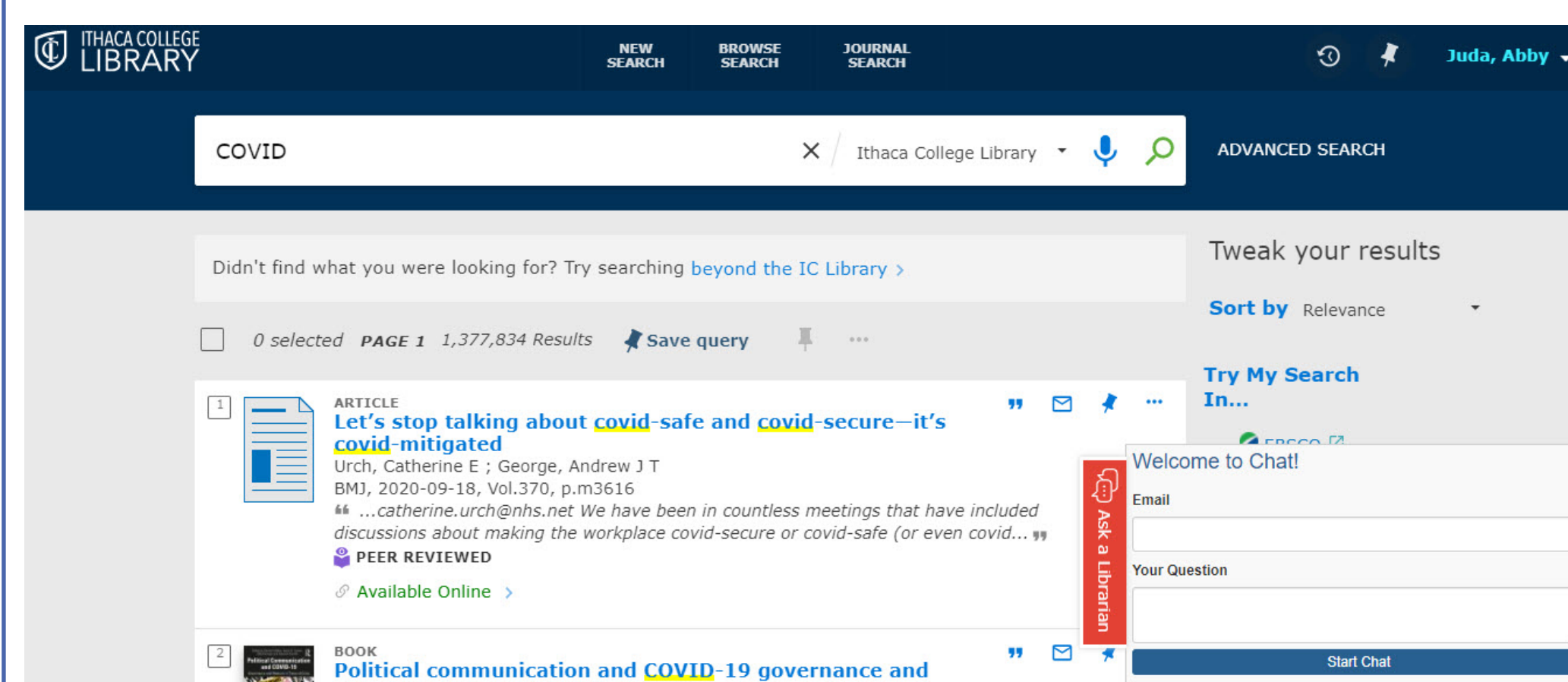
INTRODUCTION

Ithaca College had, until March of 2020, been using a fairly traditional reference model. We already had LibAnswers and LibCal for chat and consultations, and had a reference email for inquiries, and we had been using them for a couple of years. The bulk of our reference interactions still occurred in person at the Research Help Desk. When the campus shut down in March we were well-positioned for remote reference even as we worried about helping patrons with their information needs. We enlisted the entire library staff in helping with chat. Our web services librarian created a “help hub” that was prominently displayed on our website. We also made our chat slider, which was already available on many parts of our website, pop out after a few seconds to draw the users’ attention.

Adopting remote learning for a year introduced so many challenges for everyone, but one unexpected benefit of remote services was that we finally had all of our reference interactions tracked consistently and accurately. While it was an abnormal year in so many ways, we were able to get a high-level overview of reference trends and users that would be nearly impossible in any other year. This information is enabling us to make smart, data-driven decisions about our services and learn more about what are patrons want and need going forward, and what legacy services we can reduce or discontinue.

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OBJECTIVES

Part of this project emerged out of a sense of curiosity and the opportunity that virtual reference provided, but we also had several broad questions that we hope can guide the future of reference at the Ithaca College Library:

- Who is using our services?
- What types of questions are users asking?
- What trends/patterns can we see in types of questions?
- How much did COVID (and virtual services) impact our reference interactions?

METHOD

The Ithaca College library uses LibAnswers for chat, and it gives us very good analytics, but we wanted more detail. I also had concerns about including chats that weren't relevant (from other librarians checking in, greetings from regular patrons, etc.), mistakes (people clearly thinking the chat was a search box and never responding), and duplicates (chats that were dropped and then resumed). I reviewed every chat transcript for a year (March 15, 2020-March 14 2021) and assigned them to subject, user, and COVID categories. The subject categories were selected because they are the most common areas of questions and covered almost all chats. Some chats fit into multiple subject categories. Note that Music is a separate category while other disciplines are not; at Ithaca College we have traditionally treated the music collection as distinct from the rest of the collection, and I maintained that distinction here.

For **subjects** the categories were:

- Known item (any item, physical or digital, where the user has the title)
- Research help (including citation questions)
- Music (music reference and score/sheet music requests)
- ILL
- Policy (building usage, hours, capacity, etc)
- Returns & Renewals
- Online access (includes access issues and looking for online copies)
- Curbside pickup
- Digitization (both faculty/staff and student requests)

The user category was slightly less clear. We ask for email addresses but don't require users to log-in or provide credentials, so I was only able to assign categories when they self-identified. For **users**, categories were:

- Student
- Faculty/staff
- Alumni
- Retiree
- External (no Ithaca College affiliation)

I also marked whether questions were **COVID-related**. I only categorized a question as COVID-related if it was about curbside pickup, returning books while the building was closed, policy changes related to COVID, or explicitly mentioned COVID as the reason for the chat. Many other chats may have been COVID-related, but since we also get similar requests in a normal year I did not count them.

In order to determine the impact of COVID and see trends over time, I compared the data to previous years. Although we do not have the same level of detail, we have been collecting reference statistics in the RefAnalytics module of LibAnswers for several years. Chat was not a highly used feature before 2020, so I compared the total interactions at the reference desk (which include chat and email). Some of those interactions include patron data and broad subjects; where possible I looked at that data as well. Due to the differences in data collection, only a very broad comparison proved possible.

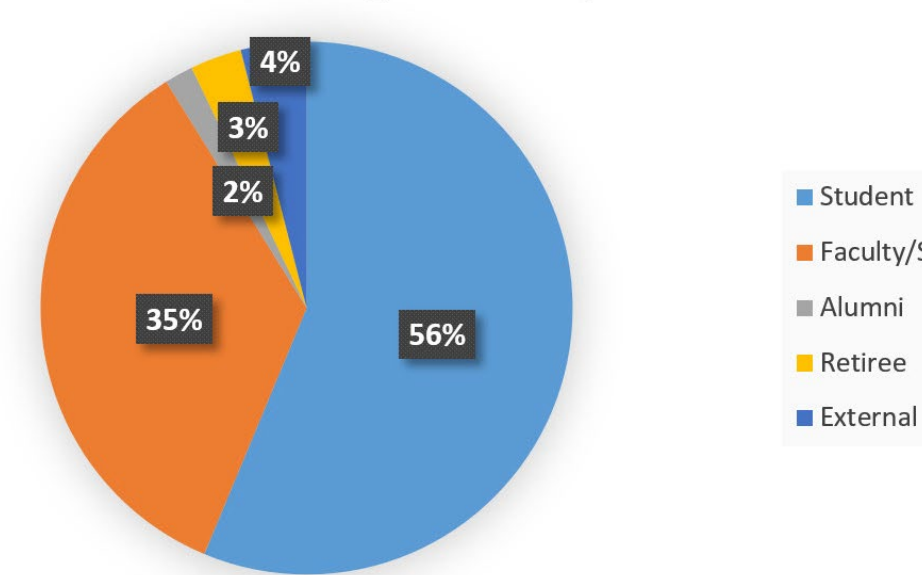
Ultimately I reviewed 1,297 chats received from March 15, 2020 to March 14, 2021. Of those, 215 were internal communications, continuation, or mistakes. 1,082 chats were categorized, and of those 148 were COVID-related.

RESULTS

The results of this analysis were in many ways very surprising. The entire library staff spent so much of the year talking about how different things were, but in so many ways the big surprise was what remained the same. Below I'll break down our results based on the original objectives.

Who is using our services?

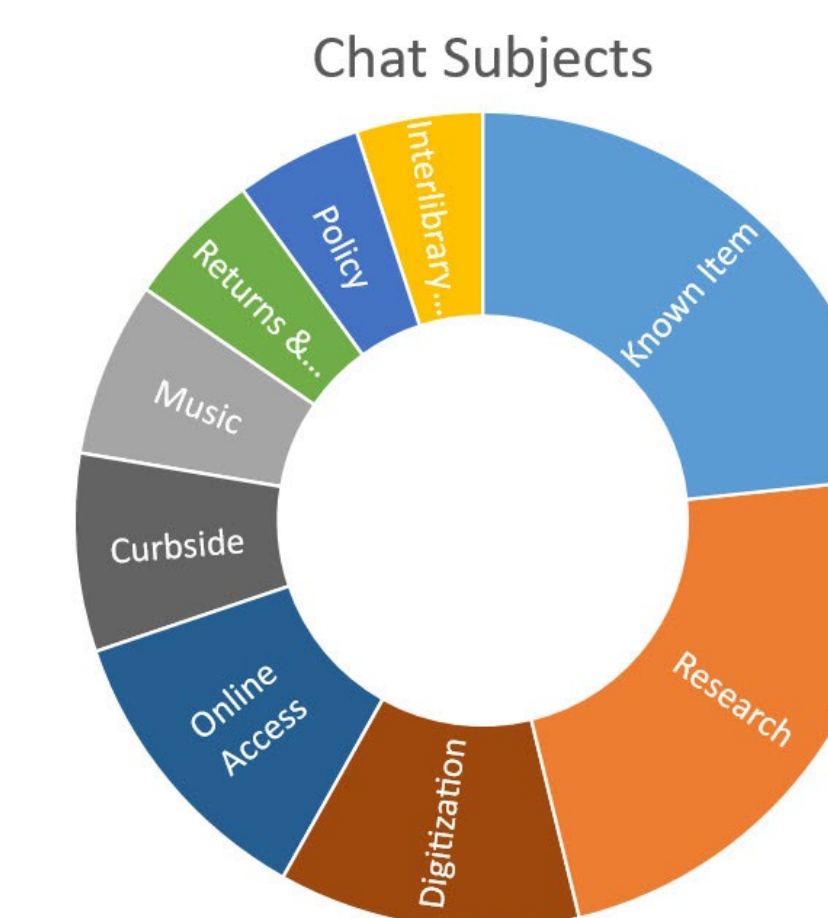
Ithaca College Library Users



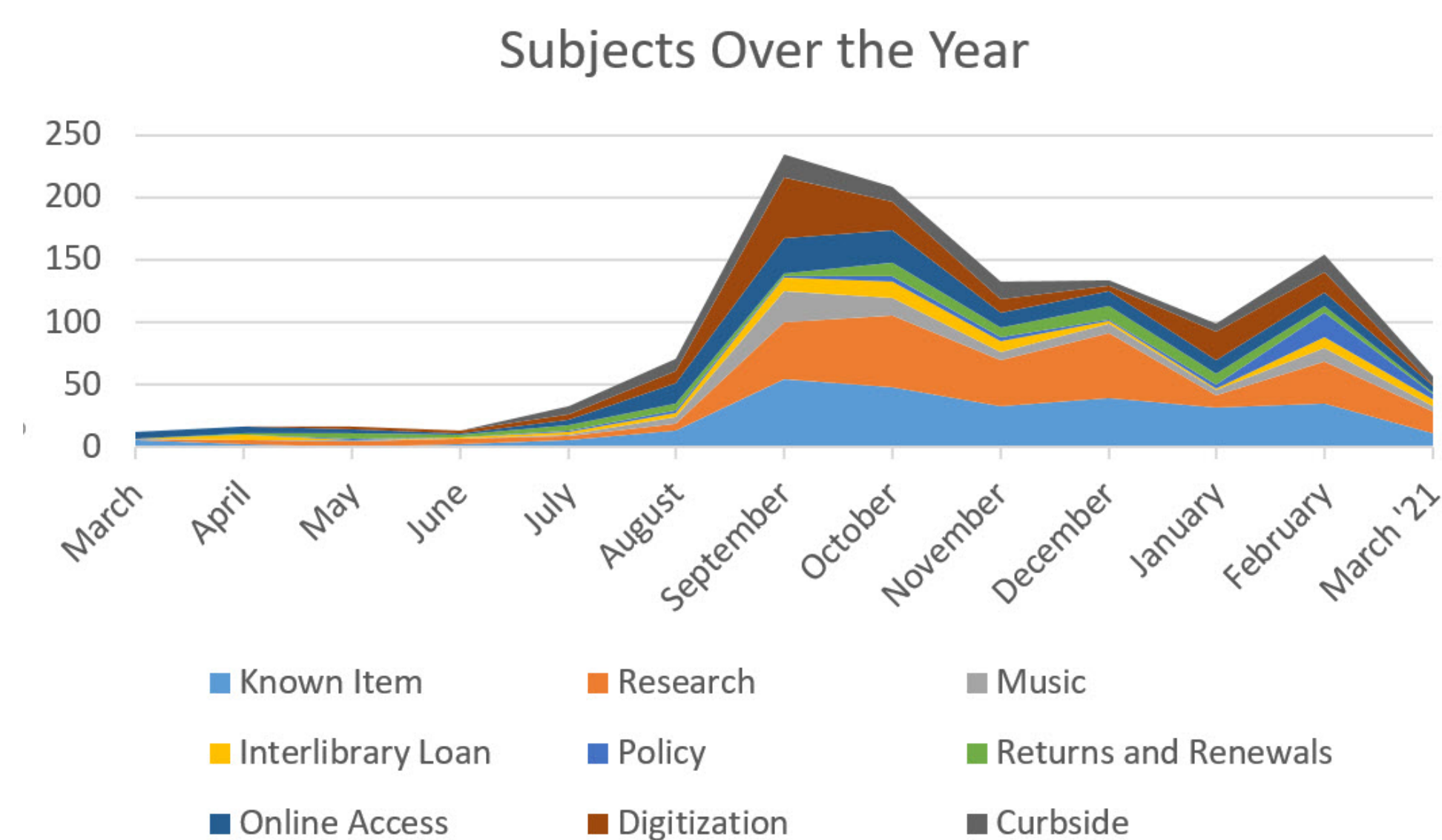
When we think about our reference services we tend to plan for students as users, so it was a bit of a surprise to discover that close to half of our chats came from other groups. The portion of faculty/staff chat users was unexpected; most faculty have strong relationships with their liaison librarian and I would have expected them to seek out their librarian via email.

What types of questions are our users asking?

For many years we've been seeing fewer reference questions at our research help desk and an increasing number of general library questions, and this year certainly continued that trend. However, the breakdown of question types is fairly similar to previous years. If anything, a greater proportion of our questions were research-related, since the closure of the building eliminated whole categories of questions (directional, supply requests, noise complaints, etc.)



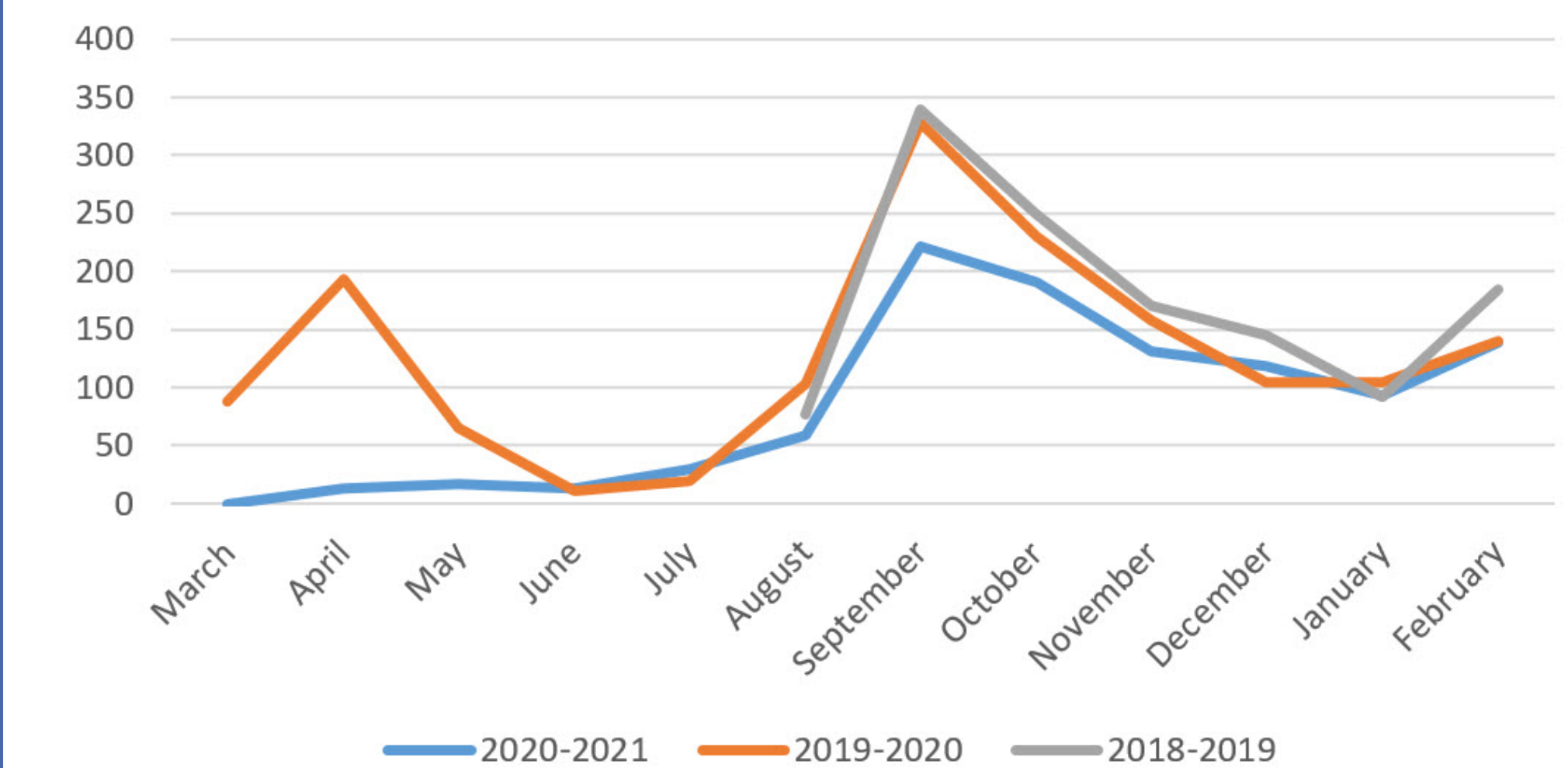
What trends/patterns can we see in question types?



Most library staff recognize the seasonal patterns of the library, and while COVID may have altered them slightly they remain familiar. Known item inquiries are fairly steady over time, while research help requests are much more time-dependent, and to some extent track with ILL requests. Digitization requests, most of which come from instructors, rise before each semester. Online access issues decline throughout the year as users become more familiar with our systems.

How did COVID and virtual services impact our reference interactions?

Reference over the years



In a sense, and unexpectedly, the answer is: not that much. Obviously things were very much interrupted in Spring of 2020, but things got more normal over time. The August/September spike was less pronounced than in other years; this seems to be almost entirely due to the lack of directional and printing questions. By mid-Fall the year becomes fairly normal – a reminder that even in challenging and uncertain times our services are needed!

CONCLUSIONS

Reviewing all of our chat transcripts was valuable, in addition to being fascinating, because it really gives a broad overview of our users and their needs. Based just on the initial objectives, a few things jump out for the future of our reference services:

- It's clear that, at least when reference is virtual, faculty are very likely to take advantage of it in large numbers. They should be considered in our decisions about chat.
- While it may feel like actual reference questions are few and far between, they still make up a significant portion of our questions. However, the large variety of questions suggests that utilizing the entire library staff on virtual reference was a good idea and worth considering in future.
- We do see some seasonal trends that we can take advantage of, and will be considering them in staffing decisions.
- Despite the attachment of some to the physical reference desk, it's pretty clear that our users will find us wherever we are, and that being virtual was not a hindrance to our patrons. Based on this data and staffing needs, we are moving to a fully virtual reference model for Fall of 2021.

Contact

Abby Juda
Natural & Social Sciences Librarian
Ithaca College
ajuda@ithaca.edu

