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Lucretia McCulley and Olivia Reinauer

Abstract: Launching virtual chat reference services at Boatwright Library at the University of Richmond has been an interesting challenge of “trial and error” over the years. After trying several different software programs and staffing options, librarians have finally found a niche with AOL’s Instant Messenger service. The first section of the article describes a path of experimentation, including early collaborations with the computing services help desk, staffing patterns within the library, technical and financial challenges with virtual reference software, and attempts to get students to use reference chat services. The second half of the case study will describe the great success with AIM service in the last year, providing statistical information as well as coverage of training and guidelines, advertising, and staffing. This article will touch on a number of themes, including the value of experimenting with a variety of chat reference software programs, and the need for library staff to stay current with new technologies.

Keywords: Instant Messaging; Virtual Reference; Chat Software

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Connecting with AIM: The Search for a Virtual Reference Niche

According to a 2004 Pew Internet and American Life Project Study, *How Americans Use Instant Messaging*, nearly 62 percent of Internet users ages eighteen to twenty-seven have used instant messaging (IM) (Schiu 2004,12). Although librarians may not have been able to precisely predict the huge popularity of IM ten years ago, libraries have been anticipating a trend of communicating virtually with users for many years. In 1994, American Libraries published an article entitled, "Reference Services in the Virtual Library" that forecasted computer interfaces using search spaces in the year 2000 (Myers, 1994). By the late 1990s, "virtual reference" was a hot topic on library listservs and publications. Opinions were argued on both sides if this technology would indeed attract students to academic library reference services. At the University of Richmond, librarians were intrigued with the technology from the beginning and decided to move forward with integrating some form of virtual reference into the existing in-person, telephone and email reference services. However, the route to successful virtual reference has been circuitous and challenging at times.

The first foray into the world of virtual reference at Boatwright Memorial Library (main library at the University of Richmond) began in 2000. The University Libraries are part of the larger Information Services Division, including the Computing Help Desk. Help Desk colleagues were also interested in exploring interactive virtual software to answer computing questions, so in early 2000 both librarians and computer specialists attended an on-campus demonstration of "Dr. Bean On Call", an interactive software program developed by Sideware Systems, Inc. Dr. Bean was based on java-based software and it was initially created for call centers. However, Sideware Systems was also interested in its application in educational settings. The Dr. Bean software was intriguing and staff moved forward with testing it in both the Help Desk and Reference Service environments. Its biggest drawback was that it was sold by individual "seats", meaning that it was not a shared, web-based product and therefore it could not be accessed easily from each librarian's computer. Due to costs, it was installed on only one computer in the Reference office. Inevitably, this was a hindrance with training and regular use by the librarians.

Limited advertising was distributed on campus and through the library's website, but librarians received very few virtual questions. By 2001, the Sideware company went bankrupt and Dr. Bean was no longer supported. Although this first experiment was not successful in terms of reaching large numbers of users, it was a good opportunity for librarians to test and learn more about the new technology.

During the spring and summer of 2001, the reference staff began the search for an alternative virtual reference system. By this time, there were several virtual software developments underway, particularly for libraries. Boatwright reference librarians attended a Virtual Reference Seminar at the Library of Congress in spring 2001. During this seminar, the Collaborative Digital Reference Service (CDRS) project, a new endeavor sponsored by the Library of Congress and OCLC was introduced. As a result of attending the conference, the library decided to participate in the new pilot project for several months. Eventually CDRS turned into OCLC's *Questionpoint* (virtual reference service). The Head of Outreach and Instruction thoroughly investigated a subscription to *QuestionPoint*, but at the time, both staff and administrators thought the relatively high cost would not equal the use. As Steve Coffman noted in "To Chat or Not to Chat: Taking Another Look at Virtual Reference," "chat can be a very expensive way to answer a reference question" (Coffman 2004, 49-50).

However, there were other options on the horizon. *24/7 Reference*, a round-the-clock reference cooperative and service that allows library patrons to ask questions and get answers from qualified reference staff in real time on the Internet was receiving a great deal of attention. Developed by the Metropolitan Cooperative Library System in Southern California, *24/7 Reference* now serves some 500 libraries (<http://www.247ref.org/>). There were many appealing features on *24/7 Reference*, including the ability to co-browse and push pages to users, but there were also several difficult technical issues with the software, primarily around firewall issues at the university. After several months of experimentation and failures with getting the software to work in the University of Richmond environment, the idea of subscribing to *24/7 Reference* was abandoned. Throughout this time period, librarians were reading as many articles and listservs as possible to explore other solutions. An article in *Online* magazine mentioned *InstantService*, a

web-based chat service headquartered in Seattle, Washington that was in pilot mode at Lehigh University (Kimmel, 2001). The fact that *InstantService* was web-based and not sold by “seats” was very appealing. Another excellent selling point was that at that time, *InstantService* was offering no-cost access to nonprofit institutions. After further communication with the Lehigh University staff, the reference librarians decided to subscribe and start web-based training with *InstantService*.

During 2002-2003, *InstantService* was used on a regular basis by librarians. It is a very user-friendly system and offers features such as the ability to push pages to users, create pre-scripted responses, transfer questions to another librarian, and record transcripts of chat sessions. During spring 2002, the service was offered from 1-5 p.m., Monday – Thursday. This was achieved by creating a separate virtual reference schedule for librarians and questions were answered at the reference librarians’ personal desk computers. At this point in time, librarians were hesitant to use the service while on duty at the physical reference desk. Although the service was advertised heavily around campus and displayed prominently on the library’s website, statistics remained low at thirty-two chats between January 1 and April 30, 2002. At the end of the semester, reference staff brainstormed on how to extend chat hours. Perhaps if evening hours were offered, students would use the service more frequently. During fall semester 2002, the reference librarians worked with library systems staff members to utilize student assistants in the library’s computer classroom to serve as the first contact of chat service in the evening. The *InstantService* technology allowed for student assistants to transfer a chat session to a librarian at the reference desk if further expertise was needed. Although the idea of using student assistants was a good one, in reality it presented several problems, primarily the provision of consistent training and supervision for the student assistants. Even during this period, statistics again remained low, with an average of thirty for fall 2002. Utilizing student assistants was still a viable option, so during spring 2003, students were hired to monitor the chat service in the reference office in the evening. This arrangement gave them closer proximity to the reference librarian which worked much better from a supervisory perspective, but usage continued to remain low and the student assistants were bored with the work.

Librarians were discouraged with the low response of questions and wrestled with the issues of providing time and training for the service, with the return of very little use. Although *InstantService* was easy for the librarians to use, it posed a barrier for student use, in that they had to go to the library's website, click on the *InstantService* icon, complete the online form with name and user information and then connect to the librarian. Reference staff concluded that the service required too much initiative on the part of the user. The Business Librarian and Business Reference Associate suggested that the service might appeal to a smaller number of users on campus, such as the students and faculty in the business school. They decided to advertise it on the Business Information Center website for the 2003-2004 year. Again, very few questions were received. Librarians were beginning to think that "chat reference was not the panacea many of us hoped for" (Coffman 2004, 49). The Head of Outreach and Instruction conducted an informal survey of various academic libraries that were also utilizing virtual reference tools and found that all of them faced the same problems of low usage on the part of students, especially when most students reside on campus. Perhaps students preferred face-to-face contact or email inquiries. Ironically, during this difficult time with virtual reference service, paths crossed again with the Computing Help Desk staff. They had heard about the experimentation with *InstantService* and were anxious to try it on the Help Desk web page, so librarians assisted them in setting up the service, but warned them of the low-use problem.

The search for a more appealing library virtual reference software continued. Although none of the reference staff were using it, instant messaging, particularly AOL's *Instant Messenger* (AIM), was growing in popularity. Would libraries turn to this technology as a way to reach users? The Head of Outreach and Instruction learned that the undergraduate library at the University North Carolina – Chapel Hill (UNC-CH) had been experimenting with AIM and had good response from students. After obtaining more details from the UNC-CH librarians, the reference staff decided to try AIM at the reference computer at the Main Service Desk. The buddy name chosen was "boatwrightinfo" and the service was launched in late November 2004. In the first three months of service, 117 questions were answered via IM. This number surpassed all of the librarians' expectations and any previous attempts with other virtual reference services. The

buddy name and service were advertised through small stickers on all the library computers and through *Spiderbytes*, the university's daily online announcement newsletter. The service and "buddy name" were even highlighted in the spring 2005 issue of the student newspaper, *The Collegian*.

Since then, use of the AIM reference service has steadily increased. During the spring 2005 semester, 189 IM questions were recorded. In fall 2005, the number rose to 298. Translated to percentages, instant messages made up 6 percent of all reference questions in the spring, and 9 percent in the fall. These percentages can be compared to e-mail questions, which fell at 4.5 percent and 3 percent respectively. Directional/other questions received at the desk were not included when calculating percentages, because the integrated main service desk causes us to receive a far greater number of general informational questions than at a traditional reference desk. While the percentage of instant messaging questions remains small compared with face-to-face questions, the setting of the university and library must also be taken into consideration. The University of Richmond serves a primarily traditional undergraduate population, 95 percent of whom reside on campus. Boatwright Library is a central location for study, group meetings, and socializing on campus. Gate counts are around 4,500 exits per day in the middle of a semester, so traffic at the desk is quite high. Considering the convenience of the physical library and reference desk to most students, the number of questions received through IM is surprising. Following the implementation and initial advertising for AIM, the informational stickers have remained on the library computers, and the service is pointed out each fall in a required library skills workshop and also in "personal librarian" letters sent out to each first year student. Word of mouth has been important in the increasing use of the AIM reference service, particularly on a small, highly residential campus.

There are a number of interesting issues to consider in determining why AIM has been successful when prior attempts were not. It is unlikely that marketing is a factor, since the library expended just as much, if not more effort in advertising *InstantService*. Could it be that the features attracting librarians to specialized virtual reference software are not as important to users (at least in the case of traditional undergraduates) as sheer convenience? AIM differs from the

other chat software tested in a number of ways, but the most important distinction may be that student users had already adopted it.

In terms of acquisition, setup, training, and staffing, AIM has certainly been simpler than many other chat software offerings. First of all, the software itself is free. And because the decision was made to handle AIM at the reference desk, no additional staffing was required. Second, it can be quickly and easily downloaded and installed on all staff computers. AIM is intended for widespread popular use, so it requires very little specialized training. Before implementing it as a virtual reference service, the reference staff was encouraged to begin using AIM with one another as a tool for interoffice communication. This experiment was highly successful, as will be addressed later. In addition, informal training sessions were provided by staff members who had experience using AIM, and meetings were held to discuss communication protocol.

AIM is also convenient from the patron's perspective. If the patron is not using AIM already, then he or she must download it from the AOL Web site and add *boatwrightinfo* as a "buddy." This process is fairly intuitive, and requires little or no instruction for most users. Following the initial download and account setup, the patron can ask questions anytime simply by opening AIM and selecting the *boatwrightinfo* buddy. Unlike some Web-based chat software, there is no need to navigate to a specific Web site or fill out a form. The process is even simpler for many people, college students in particular, because a large number of them already use AIM frequently to communicate with friends and family. The AOL, Inc. Web site states that there are 42 million active users of AIM in the United States alone. Although there has not been a formal study conducted at the University of Richmond, AIM's popularity is obvious in walking through the library. On computer monitors, accompanying browser screens or word processing documents, it is common to see students typing furiously into an open IM window.

At Boatwright Library at least, it seems that the convenience and familiarity of AIM is more important than the various "bells and whistles" offered by some of the other virtual reference technologies. First, as has been stated, many users are already using AIM frequently and have it installed on their computers. They use the library reference service just as they use IM

recreationally – as a multitasking communication tool. When they have a point of need question, they want quick, convenient answers. The necessity of recalling a particular URL, filling out a form, and potentially waiting in a queue or having to remain in a chat window interrupts the flow of their work. Similarly, they do not appear to miss features such as co-browsing or page pushing. Librarians are beginning to realize and discuss the possibility that the once hyped co-browsing technology may be more hindrance than help (Houghton 2005). Furthermore, patrons generally do not become impatient waiting for answers because they can continue their work in the meantime. The AIM window facilitates communication by informing the user when the other party is entering text. If the AIM window has been minimized or concealed by other open windows, users are alerted by sound and sight (a flashing orange bar at the bottom of the screen) when a new message has been sent.

The features of AIM combined with the flow of activity at the Boatwright Library main service desk make it possible to staff AIM, telephone reference and face to face reference service simultaneously. Reference hours are from 8:00 a.m. to 10:00 p.m. Monday-Thursday, 8:00 a.m. to 5:00 p.m. on Friday, 1:00 p.m. to 5:00 p.m. Saturday, and 1:00 p.m. to 10:00 p.m. on Sundays. The circulation and reference desks are combined. One member of the reference staff occupies the reference side, and various combinations of staff and student assistants occupy the circulation side. When a staff member logs in to the reference computer, he or she is automatically signed on to the *boatwrightinfo* AIM account. Speakers attached to the computer are turned on (low volume), so that when a new IM request is received, the librarian is alerted both by sound (chime) and sight (popup window). Face to face and telephone reference queries take precedence, and IM patrons have proven to be very patient in waiting when necessary. This is most likely because they are accustomed to keeping their AIM window open while working on other activities. Reference staff try to notify IM patrons when a wait is expected. When multiple IM requests come in simultaneously, reference staff take a moment to accept the new IM request and let them know that they will be with them after completing the current IM session. Questions are not archived automatically, so it does require a conscious effort. Boatwright Library staff must remember to save each IM session after it has been completed. The date and time of the session

are recorded in the filename (e.g. 2/12.815.htm). They are then organized into folders first by month, then by semester and year.

In terms of communication with users, the staff agreed prior to beginning the service, that a level of professionalism should be maintained even though the medium itself is informal. However, each staff member has a unique "IM style," while maintaining the same customer service practices of politeness and attentiveness that are employed in face to face transactions. Humor and friendliness are definitely appreciated by AIM patrons. The adoption of AIM for use among library staff has been important in raising the comfort level and familiarity with instant messaging. A listing of buddy names is maintained by the administrative assistant, and colleagues instant message each other with brief questions, or sometimes to find out if a staff member is at his or her desk before visiting or directing a student to them. One of AIM's features is the option of creating an "away" message that will automatically appear when the respondent is away from his or her computer. Staff use this feature to let colleagues know where they are when away from their desks, and sometimes how long they will be gone. AIM also provides "buddy info" that shows how long a particular person has been online or how long they have been "idle" (i.e. not using the computer).

Returning to the use of AIM for reference provision, one of the benefits of chat or instant messaging reference is the creation of a transcript of the reference transaction. These documented questions and responses are enormously helpful in making reference service improvements. One use for these transcripts at Boatwright Library is training. Past IM sessions have been printed and organized in a binder by general topic. New hires read through the questions to find out the types of questions commonly asked as well as the answers to those questions. Another use is to clarify library policies and responses. It is helpful for librarians and supervisors to browse chat transcripts in order to identify areas where there may be confusion or incongruities in the reference staff's responses. These are topics that may need additional attention or training. Because AIM does not provide identification of the individual librarian providing the response, transcripts are saved anonymously, thus avoiding accusation or negative criticism directed toward a particular individual. Finally, transcripts are used to identify and

respond to patron needs on a larger scale. For instance, 26 percent of reference questions (17 percent of the total volume of questions) received on AIM between January and April 2005 related to citing sources. Reference librarians responded to this need by purchasing a subscription to *NoodleBib*, a web-based citation builder that guides students through the process of creating an MLA or APA citation.

Based on the questions received via AIM between January 2005 and February 2006, reference was the most common question category, averaging 66 percent of total questions. It was followed by directional questions, which made up 22 percent and library equipment and technology questions, which weighed in at around 12 percent of total IM questions. We also created an “other” category which includes a very small number of disconnects and jokes. The one or two “joke” IM messages have been good-natured, and when a staff member responds comically in turn, it shows, at least, that librarians do have a sense of humor! Only seven such IM messages have been recorded since beginning the service. While patrons are generally much more casual in their communication than in an e-mail, they are very polite and appreciative. They do sometimes slip into common IM shorthand (e.g. lol, btw), but the reference staff has become accustomed to recognizing these abbreviations.

Although it seems reference questions might be difficult to respond to in a chat or instant messaging format, responses have been quite successful. The reference category is a general grouping that includes ready reference, citation questions, library holdings questions, and online database queries, in addition to more in-depth reference and research requests. However, research assistance requests (i.e. help finding information on a topic and/or a particular type of information) made up exactly 25 percent of reference questions from January 2005 through February 2006. In response to these questions, reference staff typically suggests one or more databases to try in searching for articles, catalog search terms, or directs the patron to one of the subject specific research guides on the library’s Web site. They often follow up by referring the patron to a subject specialist librarian or by obtaining the patron’s e-mail address in order to send additional information. Patrons have been highly satisfied by this response, as they receive some immediate assistance as well as the opportunity for additional help in the future.

	Spring 2005	Fall 2005	Jan/Feb 2006
Directional	42 (22%)	64 (22%)	12 (21%)
Equipment/Technology	18 (10%)	33 (11%)	9 (15%)
Reference	128 (68%)	195 (65%)	37 (64%)
Other (e.g. disconnects, jokes)	1 (<0%)	6 (2%)	0 (0%)
TOTAL	189	298	58

As successful as AIM has been for the University of Richmond Libraries, it is certainly not perfect. One drawback of using AIM is security. Just as in e-mail, viruses can be passed through IM software. Another issue to consider is that AOL may begin charging for AIM accounts, in which case only patrons willing to pay a fee could use the IM reference service. Furthermore, such a change could dramatically diminish the popularity and usage of AIM. In the paragraphs above, AIM has been compared to other types of virtual reference chat software with favorable results. But one aspect of some other chat software is that there is a built-in mechanism for obtaining patron feedback, such as a brief survey following the chat session. Because there is no such mechanism in AIM, the librarians have had to rely largely upon observation and usage statistics to determine AIM's success. This problem has been surmounted to some extent, by including the IM reference service in the general library website focus groups. However, a more in-depth analysis of patron response would be beneficial.

Another improvement that Boatwright Library is considering is switching from AIM to a multi-IM interface, such as Trillian. As instant messaging grows in popularity, these interfaces will provide a way to communicate with a variety of IM services, and will also offer additional features that may not be available through the individual IM providers. It would also allow patrons who use a free IM service other than AIM (e.g. MSN or Yahoo) to contact the reference desk without having to download and install a new IM software.

AIM is not necessarily the right choice for all libraries, but it works well at the present for the environment at Boatwright Library. As Carol Tenopir writes in her article on "Rethinking Virtual Reference," "librarians should ask what is the most effective way to serve your users, given limited funding and resources" (Tenopir 2004). AIM has proven to be the most effective chat option for us, in that it does not require any additional cost and it does not hinder our other modes of reference service. It has turned out to be a natural fit, both for reference staff and student users. Instant messaging will probably become even more widespread in the future, based on anecdotal observations and readings about the current use of instant messaging among the millennial generation. According to the Pew report, instant messaging is even more popular among the "Millennial" group who will soon be entering college. 84 percent of "online teens" 15-17 year olds use instant messaging and 46 percent of those aged 12-17 prefer it to e-mail or text messaging. The continuing challenge for all academic librarians is to follow their users and be present in their virtual communication.

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Pew Research Study – College and also Online Teens