QUESTIONPOINT

FINAL REPORT

1. Summary

QuestionPoint is an affordable, reliable and effective digital reference system. Even if the collaboration at its heart is ignored, it provides an excellent toolkit that cannot easily be replicated. If we accept that collaborative reference is the way forward, it is clearly the market leader, though based on CURL experiences so far, we have little evidence to suggest collaboration is the model to follow. On the other hand, it is clear that much time has been needed to embed digital reference into core services, and to grow accustomed to the model, processes and technologies. My expectation would be that collaborative activity will grow, but that CURL may not represent the best collaborative group. It might be more sensible to focus on other groupings, based on regions, subjects or 24x7 potential. Note that QuestionPoint now fully supports 24x7 coverage, asynchronous and real-time, following product enhancements subsequent to my last report to CURL. See the appendix for further information on system functionality and enhancements.

On the issue of 'reference' versus 'routine' enquiries, it remains difficult to identify all the issues. It may be that more effective promotion of services is the solution. I remain convinced that users could benefit from our assistance, despite the proliferation of services aimed directly at the end-user, and we need to reach them more effectively. However, even if routine enquiries account for the majority of those received, it is sensible to have a system with which to manage them, in order to improve the process and generate useful management information. The question about the extent to which collaboration is valuable remains unanswered; I would hope the proposed Universitas21 pilot would go some way towards answering it.

The cost of the system I believe is recuperated in terms of improved efficiency. The ability to redirect, track and archive enquiries, and generate statistical data makes QP a far more efficient way to handle enquiries than via email packages. The functionality offered by QuestionPoint Enhanced would be extremely difficult to replicate in-house, and there are few comparable commercial systems.

2. Recommendations

1. CURL should continue to represent a subscription group within QP, if only for the discounted subscription, providing sufficient CURL libraries choose to renew so as to constitute a group. Edinburgh is happy to continue to lead, if CURL wishes.
2. The CURL subscription group should continue to meet, but on an annual basis.
3. CURL members should more actively develop a Knowledge Base of questions and answers.
4. U21 members should report to CURL on experiences testing 24x7 collaboration.
5. CURL should consider promoting QP to non-CURL libraries, with a view to expanding UK interest, and participation.
6. CURL QP users should establish shared guidelines on best practice.
7. CURL QP users should explore the possibilities of more targeted groupings to increase the use and value of question-routing within the system.

3. System support, reliability and costs

a. *Support*
Responses to requests for assistance, and to suggestions, have been excellent. It is occasionally difficult to decide to whom these should go, as there is a support link on the QP site, and we have our own contact at the UK OCLC PICA office. The latter has proven most useful.

b. *Reliability*
I am not aware of any serious downtime on the service since it out of beta. There have been very occasional glitches, but these may not have been to do with OCLC servers. From the Edinburgh perspective, there has been more downtime on our own local call management system. I have had no reports of problems from other CURL participants.

c. Costs

The cost to renew is estimated to be £1800 (inc. VAT) per institution, assuming we benefit from a consortial discount of 10% (dependent on at least 6 institutions renewing). QuestionPoint Enhanced Communications doubles the subscription cost.

There are also, of course, other costs which are harder to define. Much staff time has been spent in setting up, training and supporting the system. Edinburgh has 1 FTE devoted to electronic reference, but this also includes the handling of enquiries through other systems, and some development work. Other staff also now use QP, but were already using email to handle enquiries, so after an initial investment in training, are not expending more time on enquiry work, overall.

4. CURL group news and reports

a. Group meeting, May 2003

The group met at the National Library of Scotland in May. The meeting was also attended by Jeff Penka, the QP Manager, over from the US, and two OCLC PICA staff. Discussion was constructive and opinions positive. There was also a useful live demo of the Enhanced Communications system. Fuller details are at http://www.lib.ed.ac.uk/qp/curl.shtml

b. Usage statistics, ranked according to use (*total number of questions received, April 02 – July 03*; **monthly high**)

   i. Edinburgh
      877; **109** (April 2003)

   ii. National Library of Scotland
      816; **104** (November 2002)

   iii. Liverpool
      246; **66** (February 2003)

   iv. Nottingham
      185; **42** (July 2003)

   v. Glasgow
      160; **26** (November 2002)

   vi. British Library (not accepting enquiries direct from users)
      101; **27** (October 2002)

   vii. Birmingham
      52; **31** (May 2002)

   viii. CURL total
      2504; **333** (April 2003)

c. News from participating institutions
   i. Edinburgh
      - Comparing QP with a local CMS. Plan to decide on one, or the other, or both, by end 2004.
      - 28 staff accounts on the system (6 regular users).
      - About to start trialing the Enhanced Communications software.
      - Planning 24x7 proposal with Universitas21 partners.
      - About to participate in the VLE pilot
      - 25% rise in electronic reference work generally, 2002-2003.
      - Renewal end 2003? Yes

   ii. National Library of Scotland
      - No recent feedback received.

- iii. Liverpool
  - Use of the service is steadily increasing
  - 8 staff accounts on the system – all positive about it.
  - If renewed, hope to test global routing, and chat.
  - Despite lack of use this far, potential seen for collaborative reference, with correct groupings.
  - QP regarded as offering a toolkit it would be difficult to replicate.
  - Renewal end 2003? Probably

- iv. Nottingham
  - Steady use, but not as great as anticipated – links made more prominent.
  - 17 staff accounts on the system.
  - Questions have on occasion been referred to CURL partners through the system.
  - Short trial of chat earlier this year – little takeup.
  - Renewal end 2003? Not sure

- v. Glasgow
  - No recent changes – some issues with types of enquiry received, e.g. housekeeping, and from externals with no affiliation.
  - Will be involved in 24x7 proposal with Universitas21 partners.
  - Renewal end 2003? Yes

- vi. British Library
  - Plan to develop a specialist QP service in three subject areas over the next three years.
  - No decision yet taken about continued involvement in QP Global.

- vii. Birmingham
  - Have not been able to exploit QP as much as hoped over the subscription period, due to unrelated factors.
  - Second phase of web-based library services gateway will develop virtual reference, using QP, which is seen as being central over the next phase.
  - There is interest in enquiry-referral, and chat for 24x7.
  - Will be involved in 24x7 proposal with Universitas21 partners.
  - Renewal end 2003? Yes

- viii. CURL group as a whole
  - A general feeling that real 'reference' questions are outweighed by technical or routine enquiries. This makes it less sensible to collaborate, as enquiries are often easy to answer, or specific to the institution. Complex enquiries are often to do with unique special collections.

- d. Potential members
  - i. National Library of Wales
    - No recent feedback received.
  - ii. Oxford
    - No recent feedback received.

5. Global developments
  - a. *QP Advisory Board*
    There is now an Advisory Board, chaired by OCLC and Library of Congress. In early 2003, R. David Lankes was invited to join it. Lankes is Executive Director, Information Institute of Syracuse, and founded the Virtual Reference Desk project and annual conference (http://www.vrd.org/). He is one of the leading players in this area, and his presence on the QP Board is indicative of its status in the digital reference sector.

b. *International standards*
    The development of digital reference communities, with an interest in collaboration, has resulted in interest in the application of standards, metadata and protocols in order to allow the sharing of enquiries according to subject, scope, workload, time etc. OCLC clearly has a track record in the development of library-related standards and metadata schema, which means that QP may have the edge over competitor products, and certainly over home-grown systems, for networked, and potentially collaborative, digital reference. Of particular relevance:

    i.   QuIP/QATP
         The Question Interchange Profile has developed as a means of expressing sets of 'interchanges'. These could then be transmitted so that question and answer sets can be made widely available as metadata-encoded digital objects.
         See http://www.vrd.org/Tech/QuIP/1.01/QuIP1.01d.PDF
         OCLC has been considering QuIP since 2000, and a full QuIP protocol was proposed to NISO at a workshop on networked digital reference services in 2001. This has since morphed into the Question/Answer Transaction (QAT) Protocol (QATP) – see below.

    ii. NISO Standards Committee AZ
         The above workshop resulted in the establishment of this committee, which is tasked with looking at the 'question processing transaction protocol' and 'networked reference metadata element sets'. Members of the OCLC QuestionPoint team are represented on the committee. A QATP working draft is at http://www.loc.gov/standards/netref/usecases-second-working-draft.html
         The committee homepage is http://www.niso.org/committees/committee_az.html

c. *Quality and processes*
    CURL members have all experienced varying challenges relating to the issue of how to approach the provision of an electronic reference service. E.g. how should it be staffed? How is it embedded in existing structures? What is best practice/acceptable regarding enquiry turnaround time? And so on.
    QP as a system cannot help us to answer these questions, but by being part of the QP network, we benefit in two ways:

    i.   If institutions choose to participate in the global network, they are expected to adhere to member guidelines. Institutions not involved globally, can also use the guidelines as a starting point for establishing a quality digital reference service. The guidelines address factors such as quality, accuracy, response time and monitoring of performance.
         http://www.questionpoint.org/web/members/memberguidelines.html

    ii. We can also benefit from greater development work carried out by other QP users. The Library of Congress, for example, has written a draft best practice document which looks at implementation administration and quality.
         http://www.loc.gov/rr/digiref/QP_best_practices.pdf

d. *QP global membership and stats (1st 12 months of live service, to July 2003)*
    - 800 subscribing libraries
    - 19 countries involved
    - 110 000 interactions handled, in total.

e. *Competitor products*
The market for digital reference product remains immature. There are a number of systems available to support real-time communications, and a number of collaborative content solutions, but most are not targeted specifically at libraries or reference services (the exceptions being *eLibrarian*, *Rakim*, and *24/7 Reference*). 'Toolkits' of digital reference systems such as QuestionPoint are very few in number; I am only aware of QuestionPoint and the LSSI *Virtual Reference Toolkit*. LSSI has been the market leader in this area, but I have been led to believe it is significantly more expensive than QP. Furthermore, Steve Coffman, VP of the LSSI reference division, is an outspoken opponent of collaborative reference (See "What's Wrong with Collaborative Digital Reference?", *American Libraries*, December 2002).
Details of LSSI product at http://www.vrtoolkit.net/

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Appendix

QP functionality

1. *Enhancements to core functionality*
   f. Question management
      - Ability to route enquiries out to non QP-librarians.
      - Survey feature to test user satisfaction.
      - General improvements to interface.

   a. Cooperative reference
      - Introduction of virtual groups, so that that any QP libraries can collaborate without subscribing as a consortium. It would also make it possible for the CURL group to accept new, 'virtual' members.

6. *New functionality*
   a. Enhanced Communications
      This is a real-time system allowing librarian and user to 'chat', 'co-browse' (share a web session), 'application share' (share a database session, or any software running on one of the machines) and, with the necessary hardware, use audio and video. Edinburgh have trialed it and are arranging for a subscription to test further. Cost: same as original sub.

   b. *24X7*
      It is now possible, through the use of virtual groups, to use a referral feature both for web form and chat enquiries. This means that QP now supports real 24x7 coverage. Edinburgh and others hope to test this through U21 partnerships.

7. *In development*
   a. Integration with virtual learning environments
      In August OCLC announced a trial to test the integration of QP in 'course management systems' such as WebCT. Edinburgh volunteered to participate, and are in the early stages of setting it up.

   b. Other
      OCLC have a 2003/4 enhancement schedule which includes improvements to interface, workflow, Knowledge Base and reporting (management information) features.

8. *Desired functionality*
   a. Intelligent filtering
      It is still a requirement that all questions come into one in-box, and then need to be filtered manually. The only way around this is to purchase additional profiles, at extra cost. There is no way to integrate the profiles within an overarching institutional group. The QP Manager reported in May that OCLC are investigating a way to develop this functionality by adding areas of expertise to librarian account information. There has been no update on this.

   b. Improved enquiry tracking
      The ability for the user to login to QP and view their enquiries is of very limited value presently, as they can only see if it has been answered, or not. It would be much more use if they could see that it had been read, assigned, routed etc.