

OCULA President 2001
Brent Roe,
York University



Importing the best education

On May 3 and 4, we held our special seminar on "Assessing User Needs" at the very pleasant Arboretum of the University of Guelph (p. 3)

The seminar furthered our Association's participation in OLA reorganization through its emphasis on more depth and on bringing already proven programs from other jurisdictions to Ontario. This seminar originated in Michigan and came recommended by Ontario academic librarians who had spent the extra money to go to the program there (at higher fees and with added travel costs). It was very encouraging to see how many people came out and how well they reacted.

I would like to give special thanks to Janet Kaufman from the University of Guelph (OCULA President 2000) for her hard work in planning many of the details of this very successful program.

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InsideOCULA

For and about members of the ONTARIO COLLEGE AND UNIVERSITY LIBRARY ASSOCIATION No. 15

VIRTUAL REFERENCE AT THE UNIVERSITY OF GUELPH

by Jenny Marvin

It is the night before the paper is due and you just realize that you need to get two more journal articles to meet the assignment /conference requirements. After many unsuccessful attempts at finding a suitable database you are ready to give up. If only you could get to the library and ask for some help.... Then you remember you can log into the Virtual Reference Service just launched by the library and "chat" with a reference staff member. Convenient. Problem solved.

In May, the McLaughlin Library at the University of Guelph began offering Virtual Reference Services to students in four distance education courses. It was felt that the Information Services Teams could better learn and test the service with a limited number of patrons rather than opening the service to the University community at large. And, who better to use the service than a population that typically does not receive the same level of library services as their on-campus counterparts?

The Library chose to go with Library Systems & Services Incorporated's (LSSI) Virtual Reference Desk software.

Initially developed by eGain for e-commerce call center applications, the software has been adapted to meet the needs of librarians by Steve Coffman, a professional librarian and product developer at LSSI. Hosted on servers in Germantown, Maryland, the librarian can log into the system from anywhere in the world provided their computer has the required Internet Explorer settings. VRD software is packaged with many customizable features and statistical reports and comes with in-person and online training.

Not unlike the real world, attendance was greater in those classes in which a library component was integrated into the course syllabus.

During the first few weeks of the semester, each course was offered a virtual class that first explained to the students how to use the VRD

service and then instructed them on how to use resources specific to their courses. Not unlike the real world, attendance was greater in those classes in which a library component was integrated into the course syllabus. Those students who did attend were rather keen and did not seem to have any trouble understanding how to use the system.

Like the many other institutions now offering

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If the librarian cannot answer the question, it is possible to transfer or conference the call to any other reference colleague on the system, or to any other library using the system. This functionality lends itself to a wide range of consortial arrangements. Imagine utilizing the vast wealth of subject expertise held in Ontario, Canada, North America, and the World! Not to mention the possibilities of 24 – 7 service.

Currently there are two levels of functionality to the software: Basic and Interact. Both allow the librarian to send web pages, images and locally held documents to the patron while, at the same time, explaining how to do

something using the chat function. These activities can be done on a one to one, point of need basis or in a scheduled virtual class setting.

The Interact version of the software, though in its infancy, has the greatest potential for providing virtual reference service and increasing information literacy. Its increased functionality includes two way browsing (both the patron and librarian can send pages to each other), form sharing (as one enters information into a form, the other can watch) and the ability to co-browse proprietary databases. This allows the reference transaction to be truly interactive as opposed to the librarian sending the answer without teaching the patron any skills. This allows the patron to lead the librarian through a search in the catalogue, database or search engine, and the librarian can offer advice on search terms, search options (the difference between keywords and subject headings) and the usage of Boolean operators. In such scenarios, each person can see what the other is inputting into the search forms. It is just like standing at a computer terminal, instructing the patron from over the shoulder.

At the end of the session both the patron and the librarian are emailed a complete transcript of the session including all chat exchanged and screens viewed. The patron can review and reuse this information at their convenience. A copy of the transcript is also stored in the system database for future reference and analysis by the library. ■ ■ ■

For more information on the University of Guelph's project email Jenny Marvin at jmarvin@uoguelph.ca.

virtual reference, we have not (as we feared) been flooded with reference questions. Until patrons are really aware of its existence, the service will need to be heavily promoted and made very visible so that no matter what the student is doing or where they are on the library / university / course web site they can easily move their mouse to that icon or link to get virtual library help.

As the service grows, we intend to meet the needs not only of those who are unable to get to the library, but also those who do not find it convenient to come to the physical building and those already there.

Using LSSI's Virtual Reference Desk software

From the patron's point of view, connecting with a virtual reference service using LSSI's Virtual Reference Desk software is really very simple. To initiate a session it is just a matter of clicking on an icon or text link embedded in the library's / university's / course web site. This presents the patron with a Login Screen that requests his/her name, email address, and question. Once the login screen form has been completed, the patron can click the Connect button to transfer to a queue and await the next available librarian.

The librarian monitors the queue/s from a Session Inbox that shows the number of patrons in each queue and the average wait time. When the librarian answers a call, a special browser is launched that allows the patron and librarian to work together in a collaborative web environment. Once the patron is connected, the librarian and the patron can have a chat-based dialog while they work to locate the information the patron has requested.

OCULA'S TWO-DAY SEMINAR ON ASSESSING NEEDS

VERY SUCCESSFUL FOR A WIDE RANGE OF STAFF by Sophie Bury

A two-day seminar on Assessing User Needs, hosted by OCULA at the lovely Aboretum Centre at the University of Guelph, was developed and presented by Pat Cavill and Richard Dougherty. Participants were introduced to proven principles and techniques used in determining the needs of customers. Over forty participants from academic libraries, public libraries, and special libraries took part.

Breakfast and lunch were available on each day of the seminar, and on the Thursday evening (May 3) the workshop organizers offered interested registrants the opportunity to take part in a group outing to a Greek restaurant in Guelph.

Expert knowledge

The two presenters brought with them much expert knowledge. Pat Cavill is a library consultant from Calgary, Alberta, specializing in marketing and advocacy. She is also adjunct professor at the School of Library, Archival and Information Studies at the University of British Columbia, where she teaches Marketing. Past-President of the Canadian Library Association, she is the chief trainer for Library Advocacy Now! Richard Dougherty is an organizational design consultant, who has served over 25 years as a university library administrator, a publisher and an editor. Former President of the American Library Association, he is Professor Emeritus at the School of Information at the University of Michigan. He is also the current President of the Board of Trustees of the Ann Arbor District Library.

Effective delivery

Workshop delivery involved

a combination of short formal presentations, brainstorming, and small and large group activities. For the majority of the two days, participants were seated at "max mix" tables to ensure that there was representation from different libraries at each table. These seating arrangements were very effective in facilitating useful learning experiences through sharing of information about library developments and activities.

The seminar was successful in giving participants a strong appreciation of the ever growing importance of effective customer needs assessment in today's library environment where resources are scarce and accountability is increasingly expected.

Day One: Principles

On day one, participants identified major developments and activities currently afoot in their libraries where user needs assessment could be applied to help ensure successful outcomes. Participants worked together to identify key trends (economic, political, cultural, societal, technological, etc.) that they believe will impact their libraries strongly in the next 3-5 years. Strained budgets, rapid advances in technology, and the need for succession planning with impending large scale librarian retirement were among the top three trends identified.

The day also introduced participants to components of effective customer service. It was argued that the term "customer" as opposed to "user" or "patron" is relevant and appropriate in the context of the modern day library. The relationship between needs assessment and marketing was also discussed. A brief

introduction to the concepts of preferred futuring and best practices was also provided.

Day Two: Practice

Day two focused on the practical application of various user needs assessment tools in a library context. Assessment included surveys, interviews, focus groups, and customer panels. Group exercises were used to help participants develop an activity planning model for use back home.

Highlights of the day included a mock focus group on the need for the development of performance measures for electronic resources. It was facilitated by Pat Cavill and involved representatives from six public libraries (all of whom were workshop participants).

A second highlight involved a customer panel comprising a senior university administrator (played by a library director), a teaching faculty member, and a student from the University of Guelph who were asked to respond to different questions aimed at gauging their current use and/or impressions of the university library, and their expectations in terms of the direction which library service needs to take in the future to remain effective and relevant to customer preferences.

Repeated requests by the presenters for input in terms of participants' expectations and impressions played an important role in ensuring workshop relevance.

The workshop closed with a brainstorming session aimed at identifying group memories and impressions of the workshop. Pat and Richard said that this was one of the best groups they'd ever worked with! And the feeling was mutual. ■ ■ ■

PRESIDENT'S MESSAGE

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Collaborative planning

Later in May, we also held, in collaboration with the Librarians' Group of York University, a very enjoyable spring dinner at the Faculty Club of York University. (See p. 4.) Events like this provide an ideal mix of OCULA and other colleagues from area universities and colleges. Special thanks to the York University planners – John Dupuis, Leila Fernandez, and Mark Robertson – who did most of the leg work. If your university or college would like to co-sponsor a dinner event with OCULA in your region, e-mail me <broe@yorku.ca> for details.

Super is still the key word!

While summer is a quieter time for many, our Super Conference Programme Convenors – Don Kinder (Ryerson) and Delia Antonacci (Seneca), responsible for the college and university content at the OLA's Super Conference 2002 – are working overtime. They have a very strong program coming together. Already they can be congratulated.

Watch for the Super Conference registration brochure in the fall for details, but mark the dates now: Jan. 31-Feb. 2 – you won't be disappointed!

Taking OCULA east

At our last OCULA Council meeting, we discussed some possibilities for a late fall or a spring workshop that could be held in Eastern Ontario. While we ourselves generated some interesting ideas for this, we would love to hear any ideas you may have both for content and location. Send me a note or share your idea on the OCULA listserv <ocula-l@accessola.com>.

--Brent

RICK SALUTIN PROVIDES PROVOCATIVE EVENING AT YORK

by Deborah Wills

On May 24, over 40 colleagues came to the Faculty Club at York University for delightful dinner and stimulating talk by Rick Salutin, journalist, playwright, and social activist. The event was co-sponsored by the Librarians' Group at York University and by OCULA.

As a columnist for the *Globe and Mail*, a freelance writer, a trade union organizer, and a lecturer at the University of Toronto, Salutin had a range of perspectives to bring to his discussion of the privatization of Canadian universities,

Salutin drew on years of experience with education in the 1960s, during which time he attended ten universities on three continents. He is disturbed by the idea of privatization, but takes comfort in the knowledge that this notion has a long history in education and has been fought.

He believes that the human factor cannot be denied, and that privatization is ultimately self-censoring, since it has overreached itself in areas such as health care, intellectual property, and the Walkerton crisis.

Salutin described how the marketplace has historically been colourful and enriching, occupying space on the fringes of society. Recently, however, its role has changed, and is shaping the central values of society. The direction that education is taking is a manifestation of this trend.

He admits to finding himself in the uncomfortable position of defending "indefensible" public institutions, and hopes that he can soon return to the attack.

Salutin fielded a lively and thought-provoking discussion.

PEOPLE NEWS

CONFEDERATION COLLEGE

Gina Rawson, Supervisor, Automation & Information is leaving Confederation College to accept the position of Chief Librarian, Creston Public Library in British Columbia.

UNIVERSITY OF GUELPH

Ellen Tom, Head, Technical Services, retires in October after more than 34 years of service in the Library. During her career, Ellen played a major role in a number of projects, including UTLAS' UNICAT/TELECAT, Guelph's joint development with Geac of its library system, SearchMe, and most recently, the installation of TRELIS, the joint catalogue system of the TriUniversity Group of libraries. Ellen has also contributed to OCULA, serving as a convenor of conference sessions and as the local contact at the University of Guelph.

Beth Thomsett-Scott has accepted a position in the Science and Technology Library at the University of

North Texas in Denton, Texas beginning this fall.

Helen Salmon is Associate Librarian, User Services and **Pat Hock** is Associate Director, Organizational Services, two new Associate Librarian/Director positions.

Louise Edwards, Catalogue/Academic Liaison Librarian retired July 1 after more than 30 years of service.

UNIVERSITY OF WINDSOR

Peter Zimmerman comes to us fresh from Western's Library school. He commences in July as our very own Arts and Humanities Librarian.

Leila Wallenius, recently hired by Leddy Library as "Engineering Librarian" has been promoted to "Head of Reference". We congratulate Leila on her new position.

Ruth Wallace, our Information Literacy and Cataloguing Librarian, is leaving Leddy Library to take up a position in Western's Library system.

YORK UNIVERSITY

Cynthia Archer, former Associate University Librarian at the Leddy Library, University of Windsor, has been appointed York's next University Librarian. She takes office for a five-year term. Prior to joining the University of Windsor in 1987, she was science librarian at Brock University and reference librarian at Mount Allison University.

Lois Spencer, reference librarian, is retiring after 27 years.

McMASTER UNIVERSITY

Paul Otto, formerly Library systems Manager, is now Assistant University Librarian (Systems).

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InsideOCULA describes the decisions and activities of OCULA leadership, explains OCULA program and provides news of Ontario's college and university library systems.

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2001 OCULA Council

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