



Managing a text reference consortium: the My Info Quest experience

The My Info Quest experience

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Abstract

Purpose – This paper aims to describe management and operational considerations for collaborative text reference services.

Design/methodology/approach – The authors conducted in-depth interviews with members of the My Info Quest (MIQ) management team. The paper reports on the interviews in the context of MIQ's operations as the first US nationwide, collaborative text reference service.

Findings – MIQ is a non-hierarchical organization that relies on frequent communication, enthusiastic and dedicated member librarians, and a collective sense of commitment. Challenges and lessons from MIQ's operations are discussed in the following areas: policies and procedures, staffing, service software, training, marketing, communicating and problem solving, and overall project operation.

Research limitations/implications – This paper examines collaborative text reference service only from the management perspective. Future research should investigate other aspects of collaboratively providing text reference service.

Practical implications – This paper will help libraries implement and manage collaborative text reference services. Ultimately it will contribute to the development of best practices for text reference service.

Originality/value – Text reference is the most recent reference development and it does not have a large body of literature. Current reports are primarily of a single library's experience. This paper reports on collaborative service provision. It is the only article to date that examines collaborative text reference service from the management perspective.

Keywords Virtual reference collaboration, Text reference collaboration, SMS reference, Management of collaborations, Operations of collaborations, Information management, Information retrieval

Paper type Research paper

1. Introduction

Text reference, wherein library users seek help from librarians via texting, is the most recently developed form of reference service. It is rapidly gaining popularity in the library world as texting becomes a significant avenue for communication and social activities in people's daily lives. According to Lenhart (2010a) at the Pew Internet & American Life Project, as of September 2010, about 72 percent of adult cell phone



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users send and receive text messages, up from 65 percent in September 2009. Among teen cell phone users, 87 percent text at least occasionally (Lenhart, 2010b). Adults who text, send on average ten messages per day and teens 50 (Lenhart, 2010, p. 2).

Currently, the text reference literature primarily encompasses individual libraries' experiences of establishing and managing text reference services, which is helpful for interested libraries to learn about the service from the stand-alone perspective. However, similar to email and chat reference, text reference service can also be provided in a collaborative fashion. Multiple libraries may form a consortium and take turns to answer questions from users of all member libraries. My Info Quest (MIQ) is one such text reference consortium, with participation by twenty-five libraries (as of January 2012) across the country, including both public and academic. More detailed information about participating libraries can be found on the project web site <http://myinfoquest.info/>. In addition, five individual librarians, not associated with any member library, donate their time to provide services for the consortium. MIQ was initiated by the Alliance Library System in Illinois and launched in July 2009. It is self-organized and managed by volunteering member librarians.

Providing reference service collaboratively is beneficial in many aspects. Usually the driving purpose is to share resources and distribute staffing commitments between libraries. For a comparatively minimal investment, libraries are able to expand the number of service hours and increase the volume of transactions. Reference consortia not only allow libraries to make more efficient use of scarce resources such as materials, time, money, and staff, but also provide benefits from "network effects", in which the value of a consortium increases as the number of members of that consortium increases. In addition, interactions amongst participating librarians can lead to better understanding, closer relationships, and even other opportunities to collaborate (Pomerantz, 2006). Given the budget constraints many libraries face nowadays, participating in a consortium is becoming an increasingly appealing and practical option for offering text reference service.

As the first nationwide collaborative text reference service, study of MIQ's experience will help develop a better professional understanding of collaborative text reference practice. Libraries interested in initiating a text reference consortium will benefit from knowledge of MIQ's operations. To date, three articles detailing different aspects of MIQ's operations have been published. Luo and Bell (2010) surveyed participating librarians and identified areas where improvement could be made to enhance librarian experiences and provide more effective service delivery. Jensen (2010) reflected upon his own involvement in MIQ and presented personal observations of MIQ's pros and cons. Avery *et al.* (2010) discussed the marketing approaches employed by MIQ, focusing on how the collaborative helped member libraries publicize the service at the local level. To further contribute to the endeavor of sharing MIQ's experience with the professional community, this study seeks to build upon the existing work and explore MIQ's model from the management perspective. MIQ's management team consists of volunteers from participating libraries, and in-depth interviews were conducted with key members of the team in order to investigate the challenges and lessons in managing a text reference consortium. Findings from the study will help libraries better understand the inner workings of MIQ and thus lead to more success in establishing and managing text reference consortia.

2. Literature review

Collaboration in reference service is a recent phenomenon resulting from the use of digital network and communication technologies in service delivery. In desk or telephone reference settings, collaboration between libraries only happens when librarians refer users to another institution for further information, or make the contact on their behalf (Pomerantz, 2006). For virtual reference services supported by digital technologies, reference consortia can be easily established, allowing libraries to take turns in staffing the service and share costs.

In the literature, collaborative virtual reference most commonly refers to chat service. Chat reference is generally distinct from instant messaging (IM) in that it requires special software. IM reference in contrast usually refers to a service provided by an individual library using a free aggregator, such as Meebo or Trillian, which allows patrons to use their pre-existing account in a service such as AIM, Yahoo Messenger or iChat. Collaborative Virtual Reference Services (CVRS) have been formed across wide and small geographic regions, with as little as two or as many as hundreds of participants. They may consist of a single type of library or of a diverse range.

Many CVRS are initiated by a pre-existing consortium that already provides collaborative cataloging or acquisition (Mon *et al.*, 2009; Bodner, 2009). A project coordinator is usually employed to coordinate, advocate and recruit for the service (Johnson, 2010). The task of governance is often shouldered by committees that are in charge of different aspects of the service such as quality control, the knowledge base, policies and procedures, promotions and publications (Sachs, 2005).

Benefits of CVRS have been extensively discussed in the literature (Bailey-Hainer, 2003; Stockham *et al.*, 2003; Parker and Johnson, 2003; Truelson, 2004; Quinn and Briggs, 2007; Bishop and Torrence, 2007; Summey and Akers, 2007; Pomerantz, 2006; Eakin and Pomerantz, 2008). Some frequently asserted benefits include:

- Shared expenses and staffing responsibilities make CVRS a cost-effective option in delivering virtual reference services. Libraries increase several times over the volume of transactions that they are able to handle during their hours of service, in addition to dramatically expanding the number of hours that chat reference service can be offered to their primary user community.
- CVRS foster a greater understanding between the cultures of different institutions and offer opportunities for professional and community development.
- A greater pool of subject expertise is available, increasing the efficiency and effectiveness of answering certain reference questions.

In the meantime, there are also a number of challenges in providing reference services collaboratively. Luo and Bell (2010) reviewed the literature and concluded that three major challenges often emerged:

- (1) Library users tend to assume they are connecting to a librarian from their local library, but most of the time their questions are answered by librarians from other member libraries in the CVRS. Thus it is necessary to educate users about the collaborative nature of CVRS and ensure that they have a clear understanding of what to expect from it. Local questions may also increase the amount of training and documentation that member librarians need in order to provide the same quality of service patrons are given at the reference desk.

- (2) To avoid missing shifts, it is important to maintain clear and consistent communications regarding scheduling and swapping service hours, especially when member libraries come from different time zones.
- (3) Quality control is an essential issue as member libraries serve different user communities that have different expectations. Thus it is important to establish unambiguous guidelines on service level, policy and best practices to ensure consistency in service quality.

The literature documenting the benefits and challenges of CVRS provides a foundational view of reference collaboration in the digital age. It serves as a larger context for understanding collaborative text reference services. Meanwhile, since text reference is a relatively nascent reference format, the current literature focuses primarily on how to establish the service in a particular library and little research has been conducted to examine the service through the collaborative lens. Some prominent studies about individual text reference service are as follows:

- Giles and Grey-Smith (2005) reported the implementation of text reference service at Curtin University in Australia;
- Hill *et al.* (2007) discussed the offering of text reference service at Southeastern Louisiana University;
- Kohl and Keating (2009) shared the text reference experience at Bryant University was shared;
- Pearce (2010) depicted the implementation and use of text reference service at New York University;
- Weimer (2010) discussed the text reference experience at University of Virginia;
- Cole and Krkoska (2011) presented Cornell's preliminary experiences of launching text reference service was presented; and
- Stahr (2011) reported usage statistics and question types of Southeastern Louisiana University's text reference service.

These studies provide a detailed view of establishing and managing text reference service from the stand-alone perspective. To build upon them and further the professional understanding of text reference service, more empirical research is needed to investigate the service from the collaborative perspective. In this study, lessons and challenges identified from MIQ's experience will not only offer insights for forming text reference consortia in particular, but also contribute to the growth of knowledge on collaborative reference services in general.

3. The MIQ model and its lessons/challenges

Launched in July 2009, MIQ is a self-organized and self-managed text reference consortium. Volunteers from participating libraries form the management team that oversees the different aspects of MIQ and handles various kinds of issues related to service operation. Challenges and lessons of MIQ's operation were identified from interviews with key members of the management team. There are six individuals considered as key managers of MIQ. They are responsible for different aspects of MIQ's operation. Some of them work independently, and some others lead a team of

volunteers to handle the task of governance in a particular area. Five of the six individuals were interviewed, and each interview ranged from 45 to 60 minutes in length. A brief description of the interviewees' main responsibilities at MIQ is as follows:

- Project coordinator, responsible for member recruitment, scheduling, and vendor liaison.
- Trainer and leader of the volunteer team that is in charge of policies and procedures.
- Leader of the volunteer team that develops training material, establishes the training schedule and offers training to MIQ librarians.
- Moderator of the advisory group meetings.
- Host of MIQ website and leader of the volunteer team that develops and distributes marketing and public relations material.

The interviews aimed at seeking their input on the challenges encountered and lessons learned both in their respective areas of management, and in the overall operation of MIQ. In this section, different areas of MIQ's operation are listed and basic structural details as well as challenges and lessons identified in that area are provided.

3.1 Membership

There are no restrictions on becoming an MIQ member. Any interested library is welcome to join the consortium. During each calendar year, the MIQ project coordinator disseminates calls for participation to the library community via various venues such as professional conferences and email listservs. Information about MIQ is provided to potential participants, including details on project software and cost, website, governance and communication, publicity, hours of service and evaluation. Once interested libraries review the information and decide to join, they sign a form signifying their commitment to:

- staff the service an average of two hours per week, covering assigned shifts and locating substitutes when necessary;
- promote the service by putting a link on their library website and sending information to their library users;
- appoint a staff member to attend the monthly online meeting of the advisory group;
- attend training sessions and participate in practice sessions;
- participate in evaluative activities; and
- participate in project communications.

Currently all MIQ members pay the same amount of fees to cover the service software cost. Since it is not a graduated fee structure where payment is proportional to the size of library, an interviewee raised the concern that some small libraries may find the amount too significant even though it yields "a really good return on investment".

3.2 Policies and procedures

As mentioned earlier, MIQ is self-organized and managed by volunteers. Members volunteer to take charge of different aspects of project operations such as establishing service policies and procedures. A group of volunteers developed an initial document suggesting policies such as scope of the service (e.g. questions seeking private information as well as requests for medical, legal or tax advice are considered out of scope), service hours (Central Time: Monday-Thursday 8:00 a.m.-10:00 p.m.; Friday 8:00 a.m.-6:00 p.m.; Saturday 9:00 a.m.-6:00 p.m.; and Sunday 2:00 p.m.-4:00 p.m), and response time (ten minutes). As the project progresses, this document undergoes iterations of revision which reflect the evolution of the service.

The challenges surrounding MIQ policies and procedures originate not from the process of establishing them, but in making them known to member librarians. Policy and procedure documents are usually housed on the MIQ Website; however, the responsible volunteer team does not have administrative access to the Website and this causes a delay in making updates available to the MIQ community. One interviewee commented: "It's a challenge for this kind of multistate collaborative service. I'm like the keeper of the policy and procedure document and someone else is the keeper of the official website. It'd be easier if I make a recording or update the policies and procedures, and then we upload it to some place that I have access to. So that people have immediate access, you know, as quickly as I get those recordings or revised policy and procedure documents ready to go. I can get it up on the web so that people can point to it. But getting it sort of into the more official website has been slow and kinda difficult. So, this kind of management issue becomes – how do you, in a collaborative service like this, empower people to, update slide sets and make recordings and other things that are beneficial to everybody?" A possible solution is to have a central location where documents can be shared, structured and organized easily. The same interviewee suggested, "Maybe it's a wiki or some other kind of shared document space. You don't want it to be too complicated. You don't want people go in too many places. We want you to keep it kinda simple for people to upload and update especially various documents and whatnot".

In addition to this technical challenge, it has not been easy to enforce policies and procedures among MIQ librarians. Jensen (2010), in his reflection on his involvement in MIQ, raised the same issue, pointing out that the voluntary nature of MIQ makes it awkward for anyone to police participating librarians. Even if policies and procedures are well communicated and established, some librarians may still exhibit a lack of awareness or a lack of willingness to comply. Two approaches have been used to alleviate this problem. First, it helps to constantly remind the MIQ community about policies and procedures, especially when there is a discussion about how to respond in certain circumstances: a pointer to the documents of policies and procedures not only settles the discussion but also serves as a reminder of their existence, as indicated by this comment "we remind people that, well, we talked about that and we got policies and procedures that cover that. If it's not covered the way you think it should be covered, let's talk about that." Second, Mosio Text A Librarian, the software currently used by MIQ, has a feature that allows librarians to privately comment on each others' responses to patrons' questions and offer suggestions for best practices.

3.3 Staffing

Each MIQ library covers the service for an average of two hours per week. Twice a year the MIQ project coordinator gathers information on each member library's available hours, coordinates shift planning and makes the final schedule. Scheduling software is used to assist the process. During the pilot year, MIQ used PeopleWhere to manage the continually changing and evolving schedule that is inherent in a collaborative project. However, despite its advanced features in staff scheduling, MIQ decided to discontinue its use because much of its functionality was not applicable. For example, features like staff's skill set tracking, schedule auto generating, and time off request processing are not what MIQ needed. Google Calendar, a simpler and more general-purpose calendar service, was then selected as the replacement to handle scheduling. Members share the same Google Calendar account, where they can view the established schedule and make edits to reflect agreed-upon changes.

All interviewees agreed that although it is time consuming and laborious, there is currently no better way to schedule service shifts than having the project coordinator collect members' available hours and make the schedule manually. It is particularly challenging when multiple libraries compete for the same time slots, as one interviewee commented "there always seem to be challenges; people tend to want the same hours, and that's challenging, and it's challenging to schedule the nighttime and weekend, because not as many people want those." Therefore, artful coordination is required to accommodate each member's needs.

At the early stage of MIQ, there were always missed shifts. However, since MIQ is managed by volunteers, there is no real power to require accountability from librarians. One interviewee lamented, "there's nobody to say 'if you're not doing this ... you're going to receive this sort of negative feedback' ... It's up to each individual institution to make it [showing up for MIQ shifts] part of the fabric of their librarians' work and have it affect them personally, and I don't think we're there with that yet".

As MIQ progresses and the accountability issue is frequently brought up, librarians have become more aware of it and therefore made a conscious effort not to miss their shifts. When necessary, the MIQ Google Group is used to ask for help with shift coverage if a librarian has a last-minute schedule conflict. As a result, the problem with missed shifts has dissipated.

3.4 Service software

There are three methods currently used by libraries to deliver text reference service – a stand-alone mobile device, a free IM or email application such as AIM that can receive and send text messages, and vendor-developed software. MIQ employs the third method. In the first 18 months of its operation, it used Altarama SMS Reference. With Altarama, users can text questions to a ten-digit phone number and librarians receive and respond via an email account (Altarama or any other specified email provider). Since the Altarama email system did not have a mechanism to easily differentiate questions or responses from different member libraries, MIQ chose Gmail as the alternative because its labeling feature allowed categorization of transactions. A three-letter code was created for each library. When librarians finished a transaction, they would label it with their library code. Therefore, one could easily search within Gmail to locate all the reference transactions answered by librarians from a particular library. Users were asked to include the three-letter code of their library in their text

messages in order to help libraries identify questions from their own users. However, users did not usually remember to include it every time they texted: only a third of the questions contained the code.

Overall Gmail was easy to use, but it is not designed specifically for libraries and hence lacks certain features needed in reference service provision. For example, it has limited options regarding announcing new message arrivals, which can lead to delayed responses. Reference transactions cannot be easily organized and retrieved by users' phone number when librarians need context to help answer a question, which is particularly necessary in follow-ups to questions received in previous shifts. Furthermore, when a librarian is researching an answer, there is no indication in Gmail that the question is "claimed." This can be problematic if multiple librarians are logged in and unknowingly begin working on the same question. Finally, user privacy is a concern because Google archives all the data on its servers. In January 2011, MIQ switched to its current service software, Mosio Text a Librarian.

When it comes to choosing the service software, interviewees identified a few factors they considered important:

- *Cost.* It needs to be affordable, or in one interviewee's words, "reasonably priced", in the long run, especially if the service is launched with the support of a grant. Making the service financially sustainable is an important factor to consider.
- *Flexibility.* It is necessary to accommodate various kinds of needs. As an interviewee commented "it can't be a very rigid project that you could only do it one way and that's it. The vendor has to be willing to work with us to be able to make it easier for us to use it."
- *Ease of use.* Having a friendly interface, being intuitive, and involving minimal training for service staff are characteristics highly valued by interviewees. For example, one interviewee commented on Mosio Text a Librarian's character counting feature, "the idea that you could see, you know, how many characters were in the answer that you were typing as you were typing them, impressed me."
- *Statistics tracking.* It is important to have statistic tracking features that could help libraries assess service usage.
- *Reliability.* Reliable performance reduces the likelihood of technical difficulty and enables the service to be technically sound.
- *Vendor support.* Vendor support is critical to ensuring all the technical issues are resolved timely and satisfactorily, and in buttressing the successful operation of the service.

3.5 Training

MIQ requests that every librarian who provides service first participate in an hour-long training session. The training session is designed and provided by a team of volunteer members. They determine the content and duration, prepare the material, set the schedule, and conduct the sessions. Each training session is provided via an online conferencing system. All sessions are recorded for librarians who are not able to participate live. The two main topics covered are a step-by-step technical demonstration of how to provide the service and an introduction of policies and procedures.

When determining what to cover in the training session, the trainers first put themselves in the place of trainees, asking questions such as “What do I need to do when I’m coming on shift? What do I need to do in the midst of my shift? What do I need to do at the end of my shift”, and then decided what kinds of knowledge/delivery methods would ensure successful mastery of the answers. An interviewee used the term “thought experiment” to describe this process. As a result, MIQ training focuses on the “nuts and bolts” of service technology and provides an overview of policies and procedures.

Since MIQ members are geographically distributed, training is conducted online using Web conferencing software. The key to online training success is to never overwhelm people and to keep the session within one hour. As one interviewee commented “If you’re going to go longer than an hour, do so at your peril. Because a lot of people, their mind starts to wander or they’re busy and they need to go some place; an hour is about as much as most people are able to or willing to commit to any kind of online event, whether it’s training or some other kind of event”.

There are other difficulties to overcome in conducting training for a national collaboration. The lack of nonverbal cues in online communications poses a challenge in making training engaging, as an interviewee commented “you don’t want it to be a dry kind of thing. And one of the challenges online is that it can be very difficult to, you know, provide nonverbal feedback like gestures and facial expressions that can make an in-person training session engaging.” Solutions to overcome the challenge, as suggested by interviewees, include employing interactive features of the Web conferencing software (e.g. conducting polls), encouraging text chat and responding promptly, stating the main points at the beginning and reiterating them at the end to reinforce understanding, and allowing time for trainees to have some hands-on practice and address questions arising from it. As MIQ’s geographic distribution crosses several time zones, it is difficult to select times that are convenient for everybody. Therefore, in addition to offering as many sessions as possible, recordings of each session are shared among all MIQ librarians so those not able to join any live session can view them at their convenience.

Training is a dynamic and fluid component of MIQ’s operation as the service itself is constantly evolving. On one hand, when there is an update in technology, policies and procedures or other aspects of service provision, it needs to be reflected in training. On the other, training does not end the moment the online session is finished, and ongoing support is necessary. It is important that trainees “feel empowered to ask questions and explore possibilities as they get into the routine of providing service”, and that they have “a community that’s helpful and willing to assist them as they work through some of these issues and learn some of these procedures”.

There is no formal assessment of how the training is received. According to some interviewees, anecdotal evidence suggests that trainees feel positive about their experience. Interviewees do consider formal assessment useful and think that it should be conducted if time and staffing allows.

3.6 Marketing

Marketing has two layers of meaning: MIQ marketing itself to interested libraries and prospective participants, and members of MIQ marketing the service to their library users. Volunteers responsible for marketing and public relations drafted the

promotional material (e.g. flyers, brochures) and press releases both at the consortium level and at the local level. Members can help distribute the consortium-level material at conferences and other professional gatherings to attract potential participants, and they can also customize local-level material for their own marketing purposes. All marketing documents are stored on the MIQ Website for members to access. More detailed information about MIQ's marketing approaches can be found in Avery *et al.*'s (2010) article on collaborative marketing at MIQ.

Regardless of the purpose of marketing, to recruit more member libraries or to engage more library users, interviewees all agreed that a variety of methods should be employed. One interviewee shared that according to a survey among MIQ libraries, "Many of them found out about it through e-mail, list serves and through conference presentations". Some particularly believed in the power of word of mouth advertisement and having a personal touch, as a comment about librarian-oriented marketing indicated: "What probably works the best is the personal touch, talking to people about it, giving presentations on it, getting out there so that people could see what's going on with it and making those presentations". Another important aspect of marketing is that it has to be a consistent and frequent effort. One interviewee explained: "We are certainly not the only institution to be hit with budget cuts and staff reductions resulting from those cuts, and so as for lessons learned from marketing, you absolutely have to do it. You have to do it consistently and frequently, and yet it's really, really hard to do it, to weave it into all of our other responsibilities."

A final challenge of marketing is brand confusion between MIQ and the service software it uses – Mosio Text a Librarian. An interviewee pointed out that co-branding with Text a Librarian may get MIQ "lost in translation". The interviewee further commented, "How do we market MIQ when Text a Librarian is right there too; so it's an issue and it's not a resolved issue. It reminds me of how library systems are very challenged to market themselves. We're so behind the scenes. This thing about Text a Librarian and its own brand and how visible it is, you know we're just kind of becoming a collaborative way of doing Text a Librarian."

3.7 Communication and problem solving

There are two primary venues for MIQ librarians to communicate with each other, identify issues that arise from the project and brainstorm how to tackle them. The first is the monthly online advisory group meeting. The advisory group consists of representatives from each member library, but the online meetings are open to all participating librarians. A few volunteer members serve as meeting organizers and coordinators. They establish the agenda and act as moderators. During each meeting, updates on various aspects of the project (e.g. policies and procedures, membership, marketing and public relations, and training) are provided and feedback is invited. If there are issues that need to be resolved, they are brought forth for group discussion and solution. For example, the advisory group meetings produced decisions on how to handle problem patrons and what to do when MIQ policies are in conflict with members' own. Librarians who are not able to attend the meetings can access recordings at a later time. Recently, upon requests from librarians, when each meeting recording is made available, main decisions and action items are summarized and sent to the entire MIQ community as well.

The second venue is a Google group where MIQ librarians can communicate via email. Here are a few exemplar uses of the Google group:

- request emergency shift coverage;
- seek help on answering questions;
- make announcements about MIQ related events; and
- raise concerns and propose ideas about the operation of MIQ.

All interviewees agreed that these two venues constitute an effective mechanism for communicating and problem solving, as indicated by this comment, “I just think it’s a good way to sort of share information and people can raise concerns. There’s a lot of camaraderie and, you know, it’s a talkative or chatty group. It kind of amazes me that we never had an in-person meeting and yet I feel like we are akin. And we do have a shared vision and we do feel like we can work through many issues. And the fact that we’re able to transition from one service software to another, you know, any transition in a library environment can be difficult and wacky and bumpy; looking back on it, it wasn’t that bad that we’re actually able to steer ourselves through that process quite well, I thought.”

However, a few challenges and lessons were also identified:

- At advisory group meetings, it is important to let participants “talk things out” as much as they want, “even if you feel that the decision has been made and that we’re going in one direction; people need to be able to feel comfortable talking things out.”
- Since the advisory group meetings are open to all MIQ librarians, there are many people with many voices, making it challenging to have a consensus. On the other hand, even if everyone is invited to the meetings, many do not attend or view the recordings later. One interviewee lamented, “sometimes we can’t seem to agree what our best step is, what the next step should be in order to deal with this issue that has come up. So I think the group might be a little too large. But for the most part, there are times when I wish everybody, who is part of MIQ, could be attending these meetings because there are a lot of things that we do end up deciding that people then end up not hearing about, for whatever reason, and I wish they would.”
- It is challenging to follow up on the decisions made at advisory group meetings and move forward with actions. This is attributed to the fact that MIQ is a loosely structured and rather ad-hoc organization. The management team is not an elected or appointed body but consists of volunteers, making it difficult to “require” anything. Thus, as one interviewee pointed out, “there’s some frustration because we bring the same things up over and over again, but I think that’s part of the growing process.”

3.8 Assessment

The purpose of MIQ assessment is to identify best practices and improve quality of the service. Every month the volunteer responsible for assessment produces a report containing all the transactions (questions and answers, time stamps, user ID, librarian ID, etc) from that month. MIQ members can use this report to examine questions from their own library users and responses provided by their own librarians. In addition, a

research grant from the Institute of Museum and Library Services (IMLS) was awarded to the volunteer to conduct in-depth evaluation of MIQ, including:

- a thorough analysis of a random sample of MIQ transactions to determine the types of information needs fulfilled by the service as well as characteristics of the transactions such as responsiveness and interactivity;
- focus group interviews among teen library users about their perception and use of MIQ;
- surveys among MIQ library users about their use and non-use of MIQ;
- survey among MIQ librarians about their experiences; and
- a Delphi study among MIQ librarians to identify competencies requisite for providing text reference service.

Results of the IMLS evaluation research will be used to develop best practices guidelines, to inform MIQ training and to help other interested libraries successfully implement text reference service.

3.9 Overall project operation

All interviewees identified the benefits of delivering text reference service collaboratively to be cost effectiveness in saving staff time and extending service hours as well as opportunities for professional networking/development, echoing the findings in virtual reference service literature. They also suggested ideas for service improvement and more effective project management. One popular idea was to expand the service to 24/7 through collaboration across more time zones. It is a shared belief that a true 24/7 service should be the goal of all collaborative services. One interviewee even envisioned an ideal model where the service does not operate on designated shifts but instead relies on the passion, dedication and sheer number of participating librarians. If the collaboration is at a scale large enough to always have a group of librarians voluntarily staff the service at any point of time, “the power of the collaborative” can help enhance localized service and facilitate distribution of subject expertise among librarians. In the interviewee’s words, “I think actually when we get back to efficiency and return on investment, we spend an inordinate amount of time worrying about the schedule, planning the schedule, enforcing the schedule, shift changes and swaps and what not; if you can cut through all that and get to a total different kind of service paradigm . . . there’d be a whole group of people on providing service, chatting amongst themselves between questions and when one comes in, one of them quickly picks it up and answers.”

Unlike other collaborative virtual reference services where a paid project coordinator coordinates, advocates and recruits for the service (Johnson, 2010), MIQ is self-organized and managed by volunteers, requiring significant commitment from member librarians. Additionally, because of the fluidity in MIQ’s membership, as libraries leave or join MIQ, there is usually a shift in the volunteer team, which may transpire into management sustainability issues in the long run. A remedy to this concern is to employ a full-time or part-time project coordinator. However, given the budget constraints faced by many libraries nowadays, this has become less likely.

When asked to provide a word of advice for libraries interested in providing text reference service collaboratively, interviewees offered three suggestions:

- Be sure that a collaborative service meets the needs of both library users and library staff.
- Establish a sense of shared mission.
- Join an existing collaborative service as a test ride to minimize the risks of experimenting with new service technologies.

4. Conclusion

Apparently, MIQ does not fit in the traditional model of reference collaboration. It lacks two distinct characteristics of most virtual reference consortia: having a pre-existing collaborative effort (e.g. of cataloging or acquisition) as the foundation, and having a paid project coordinator that handles logistics of the service (Mon *et al.* 2009; Bodner, 2009; Johnson, 2010). Instead, MIQ is a ground-up initiative that is completely self-organized and self-managed. It does not have a strict administrative hierarchy but relies on volunteers to oversee the project operation. Interviews with members of the management team indicate that there are three things critical to MIQ's success:

- (1) A group of librarian volunteers who are enthusiastic about text reference service and dedicated to making the collaborative service work.
- (2) Effective communications among MIQ librarians via the Google Group and the advisory group meetings.
- (3) A goal-oriented and supportive community and a collective sense of commitment.

Despite the difference in initiation and organization, the way the management task is distributed at MIQ is similar to other virtual reference consortia. Sachs (2005) pointed out that in collaborative chat reference services the task of governance is often shouldered by committees responsible for different aspects of the service. The same approach was employed at MIQ. The key members of the management team, most of who were interviewed in this study, each lead a group of volunteers and take charge of a certain area of MIQ's operation (e.g. training, marketing, scheduling, etc). Regarding how each service aspect is managed, no matter what the service venue is, the determining factors include what the service goal is, who the participating members are, how members communicate and work with each other, and what each member library's staffing commitment is. Since chat reference has a longer history of collaboration, management of text reference consortia can benefit from successful administrative experiences in collaborative chat reference service. For example, tactics such as effective marketing campaigns and efficient member communication mechanisms can be transferred, thus avoiding redundancy of reinventing the wheel.

In addition to similar governance structure, MIQ also shares the challenges that are common in other virtual reference consortia. Two such challenges are effective scheduling/shift planning to improve accountability and establishing/enforcing policies and procedures to ensure consistent quality practice. MIQ's solution to these challenges is constant communications. When issues in these challenging areas arise, they are acknowledged immediately and discussed via the different communication venues; then corresponding decisions are made and policies are updated accordingly. If they reemerge, a new round of discussion will take place to draw attention to them and to remind the group of related policies and procedures. Constant communications help

raise awareness and reinforce understandings, and eventually lead to both a reduction of problems in practice and the enhancement of service performance. In the meantime, useful lessons of MIQ's operation were also identified. Interested libraries will benefit from these lessons and develop a better understanding of different aspects of a collaborative text reference service, such as staffing, marketing, training, selecting service software, communicating and problem solving. The authors hope that, through sharing MIQ's experience from the management perspective, this study yields insights that will help libraries to implement and manage text reference consortia more effectively and efficiently, and that the study will ultimately contribute to establishing best practices guidelines for all collaborative text reference services.

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