

Ask A Librarian Delaware
First Liaison Meeting; October 26, 2011



1. Introductions and "How's it Going?" for each library - around the table sharing
2. Cathay - Update since January 2011
 - a. Currently have 16 libraries (1 special, 2 academic, 13 public) and 27 hours of chat service per week. This is soon growing to 30 hours or more; New Castle County PL is starting training soon and another volunteer librarian is beginning training soon (under DDL).

There have been over 1800 chat sessions requested by Delaware patrons since January and now that Delaware librarians are online, many are being answered directly by them.

We are seeing a break out of libraries on the reports since chat forms are now being correctly linked on provider libraries' websites for their patrons' use.

- b. We had a group discussion about determining the requirements for providing chat as Ask A Librarian Delaware staff:
 - i. Staff from a Delaware library must be recommended by a library director or manager or other administrator.
 - ii. Should have some computer skills (typing, using a mouse, navigation online) and be comfortable with using the Internet, catalog, databases (and willing to learn as skills increase during chat use).
 - iii. Must be a degreed librarian, LALI,/LATI graduate, a Library Associate, or someone who has recent experience with reference service in a library. For example, if a Delaware library hires staff to cover the reference desk, that person should be able to provide chat reference as an extension of their library's services.
 - iv. Must have professional demeanor, including good grammar and spelling skills.
 - v. Be eager to learn and embrace new technology (such as regarding eBooks).

Liaisons present agreed to the above requirements. These requirements may be adjusted at a future date, as needed.

Volunteer librarians who provide service directly through DDL and supervised by the Statewide Coordinator must have exceptional skills and references. MLS/MLIS degrees are preferred. There will be no more than five volunteers at a time.

Contact Cathay Crosby for more information.

- c. Displayed "Report by Institution" list and showed the effect of having the chat form linked for each providing library:
 - i. There are two ways to have library listed.
 1. Library specific logo on website
 2. or through <http://lib.de.us/askalibrarian> and select providing library (or "other" if library is not providing service).
- d. Staff support site: <http://aalstaff.lib.de.us>

- i. Demonstrated current site, including the statewide schedule and procedures, quality tips/resources, training and registration information and resources, and more.
- ii. No login required for use.
- iii. For the schedule and procedures, use this site now
- iv. For contact information –
 - 1. Cathay’s Meebo widget, phone number and email address are on the site
 - 2. Liaisons suggested having their contact information on the site – **all present agreed.**

3. What is a liaison? Defining the role and discussions:

- a. Represent their library as a provider of the Ask a Librarian Delaware Virtual Reference service and perform some basic administrative duties.
- b. Administrative duties include but are not limited to:
 - i. Reports
 - ii. Policy pages
 - iii. Follow-up
 - 1. Quality review follow-ups
 - 2. Follow up with customer through QP email
 - iv. Regularly attends meetings
 - v. Provides customer contact information
 - vi. Recommends staff for AalDE new staff training
 - vii. Gives ideas and suggestions for improvement
 - viii. Advocacy and marketing
- c. Overall PIN procedure – as a statewide service:
 - i. Online patron must provide full name, card number and email.
 - ii. Use QP email follow up process to send the patron their PIN if information matches in Sirsi/Workflows. If needed, change email address on question transcript to match one on their account (procedures were shown during training in the afternoon).

4. Lunch – 12:00 – 12:45

5. Training – reports

- a. www.questionpoint.org
 - i. Librarian logon
 - ii. Use your ADMINISTRATOR code (not the same code as for chatting)
 - iii. Password is same for most/if forgotten, retrieve through email in QP
 - iv. Under Question Lists / Shared Follow-up
 - 1. Click on question to view more detail
 - 2. Don’t claim an answer under the administrative account
 - v. Reports tab
 - 1. Institution report
 - a. Select monthly or daily report
 - i. Monthly will not give you the month you are CURRENTLY in

- b. # of chat sessions requested & # of chat sessions accepted: the two fields we use for consistent reporting
 - 2. Report by single librarian
 - a. See QuestionPoint reports quick reference guide
 - vi. Home / Password (to change password)
 - vii. Home / Settings
 - 1. Changed name and email address to liaison/representative
 - 2. Session timeout changed to 2 hours
 - viii. Home / Coverage
 - 1. Use Google calendar, not QP (*ignore this field-cc*)
 - ix. Home / Cooperative resources
 - 1. Credo – just for librarians
 - x. Right hand menu options list lots of resources
 - xi. QuestionPoint wiki
- 6. Training – policy pages
 - a. Top right drop down box select Profile / Institution Services / Policies
 - b. Click Edit under each section to make changes
 - c. If you provide QP service you can receive Worldcat.org for free
 - i. There is interest about free WorldCat Registry options from OCLC **(Cathay will check into this with QP and get back to group.)**
 - 7. Training – processing questions
 - a. My questions / active
 - b. Once you claim a question you can refer: back to shared follow-up, or to a subject expert, or to an email address.
 - c. Once you claim a question you can also select Answer if you can finish the question
 - d. Changing patron email
 - i. Once you claim a question, click Change patron email
 - ii. CLOSE question when done. A new question will be generated.
 - iii. See email follow-up handout
 - 8. Questions
 - a. Follow-up
 - i. When reviewing transcripts, copy and paste transcript or survey directly into email for reference.
 - ii. When the Statewide Coordinator reviews transcripts and finds any issues or compliments to relay, she will communicate directly to liaison.
 - iii. Liaison will communicate directly with either managers (NCCo) or staff, as their procedures indicate.
 - b. **Send Cathay the liaison information for your library**
 - 9. Next meeting – location and date not yet determined. Liaison meetings will be quarterly.
 - a. **Cathay will send out a Doodle for meeting options.**
 - i. Proposed dates are Wed., January 11 (conflicts with SIMA), Thursday Jan. 12, Wednesday Jan 18 and Thursday January 19. Time: 10am – 12:30pm.
 - b. Locations: Libraries who would like to host future meetings should contact Cathay. It would be nice to have meetings at provider libraries so we can see each other’s places.

10. Meeting adjourned at about 4:00pm.

In attendance:

Michelle Hughes – Dover
Katy Goff – Dover
Mary Brittingham – Millsboro
Beverly LaFazia - Millsboro
Bonnie Bly Elliott– Georgetown
Laurel Ferris – DTCC Wilmington
Kevin Turner – Brandywine Hundred/Representing New Castle County
Heather Gore – Delmar
Susan Upole – Delmar
Lynn Haines – Sussex Dept. of Libraries
Aurelia Simon – DTCC Stanton
Wendy Roberts – Laurel
Rachel Wackett – Seaford
Jim McCloskey– Wilmington University

Notified absence:

Pam Munro - Selbyville
Kristen Gramer - Lewes
Rehoboth Beach PL

Absent:

Pam Batten – Milton (notified of absence after meeting)

Meeting notes provided by: Michelle Hughes, Dover PL

Prezi presentation given at this meeting is available online at:

<http://bit.ly/vFITCj>

Other resources used:--

Ask a Librarian Staff Support Site:

<http://aalstaff.lib.de.us>

QuestionPoint's Wiki for Additional Coverage Needed (to schedule hours and make-up hours), for Best Practices, Policy Pages information, and 247 Cooperative Policies:

<http://wiki.questionpoint.org>

Note: Action items are highlighted.