

To: MOBIUS Executive Board

From: Jeannette Pierce, Associate Director for Research & Information Services, MU Libraries, on behalf of the MOBIUS Chat Reference Task Force

Date: May 25, 2015

Subject: MOBIUS Chat Reference Task Force Report

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The MOBIUS Chat Reference Task Force is pleased to share the following report and recommendations with the MOBIUS Board.

*Charge:*

*The MOBIUS Chat Reference Task Force will explore and assess various opportunities for consortium-wide participation in a virtual chat reference tool, as well as gauge member interest in participating in a shared virtual chat reference service. The Task Force will prepare a recommendation on whether to pursue implementation of a shared virtual chat reference service.*

To achieve the requirements identified in the Charge and to fully assess the opportunity to implement a consortial chat reference service, the Task Force completed the following tasks from January – April 2015.

- Literature review
- Membership survey
- Vendor demonstrations
- Platform assessment
- Interviews with coordinators of consortial reference services
- Director Survey

The literature review provided us with a foundation for the work of the task force by helping us to identify commonly used vendors and software, important features of services, potential pitfalls when implementing services, and best practices. We used this knowledge to create the member survey, a platform features checklist, and our interview questions for virtual reference coordinators.

In January 2015, the Task Force distributed a member survey. Sixty-Nine libraries responded to the survey. The results were illuminating and helped to direct the work of the Task Force.

- 24 of the respondents currently offer chat reference as a service
- More than half of the libraries providing chat reference used LibraryH3lp
- Most libraries only offer chat reference during regular service hours
- Only Rockhurst provides 24/7 service
- Only Rockhurst participates in a consortium to provide services
- 8 libraries indicated 24/7 as the “ideal” hours to offer chat reference

- Rockhurst and Saint Louis University contract with a commercial service to provide supplemental staffing; in both cases the libraries work with Chatstaff
- Of the libraries that do not offer chat reference service, 83% cite staffing limitations as a major reason for not offering chat reference; 30% indicate that there is no need or interest in chat reference; and 20% indicate that they cannot afford to offer a chat reference service
- Members identified the ability to work on mobile devices, a web-based provider platform, both visual and audio query notifications, and usage statistics as the most important features of a chat reference platform
- 29 libraries responded that they would be interested in learning more about a MOBIUS arrangement to provide consortial chat reference; 14 responded “I do not know” and 7 responded “no”

After reviewing the literature and the survey results, the Task Force decided to focus on commercial opportunities that offered the option to contract for supplemental staffing. We developed a checklist of platform features and hosted four vendor demonstrations open to the membership. Selected providers were: OCLC QuestionPoint; Altarama; LibraryH3lp; and LibChat by SpringShare.

We followed the vendor demonstrations with interviews of coordinators of virtual chat reference services. Coordinators believe there is great value in offering 24/7 chat reference and that shared staffing models are cost effective. However, it was also clear that shared staffing models are very challenging and require a high level of commitment by the institutions involved and the individual librarians staffing the services. This commitment is often most challenging for services that share staffing among widely varying types and sizes of libraries.

Altarama, LibraryH3lp, and LibChat all offer service models that work with Chatstaff as a third party staffing solution. Chatstaff offers 24x7, after-hours, and backup options for libraries offering chat reference services. Member libraries that currently contract with Chatstaff vouch for the quality of their services, as did other coordinators of virtual reference services that work with Chatstaff.

After reviewing all of the input received, the Task Force's assessment of the complexities involved led to the determination not to recommend that MOBIUS member libraries collaborate on shared chat reference service that involves member libraries staffing virtual reference for other member libraries. Instead, the Task Force is recommending that MOBIUS negotiate a contract with ChatStaff to offer evening and weekend chat reference service for MOBIUS institutions that choose to participate. Participating libraries would be responsible for offering chat reference from 8:00 a.m. to 5:00 p.m. Monday – Friday. Individual libraries may choose to identify partner libraries to provide chat reference during week days rather than provide it on their own. It would also be possible for a library to turn off chat during week day hours and just offer the service outside of regular business hours. The contract would include LibraryH3lp software at no charge.

The attached spreadsheet with pricing reflects the following:

- MOBIUS will manage a single contract with ChatStaff
- ChatStaff will provide chat reference staffing from 5:00 p.m. – 8:00 a.m. Monday – Friday, 10:00 am – 10:00 pm on Saturday, and Sunday from 10:00 am – Monday 8:00 am., as well as on federal holidays
- LibraryH3lp software will be provided to participating member libraries at no charge
- MOBIUS will promote the service to members
- MOBIUS will manage payments from members
- MOBIUS will administer a central LibraryH3lp account (setting up administrators, etc.)
- MOBIUS will facilitate or provide training and supplemental assistance on the implementation of LibraryH3lp as needed
- Participating libraries will, if possible, provide chat reference service from 8:00 a.m. – 5:00 p.m. Monday - Friday
- Participating libraries may choose to work with one or more partner libraries to provide chat reference during week days rather than provide it on their own
- Participating libraries will complete a Library Profile that will be provided to ChatStaff librarians
- Participating libraries will evaluate ChatStaff responses and communicate directly with ChatStaff about updates to the profile that will help to improve services
- Participating libraries may request that the Board form a member interest group to share experiences among members and to address questions about the proposed model as they arise

The advantages of the model described are:

- Provide patrons with support for library services at participating institutions outside of normal business hours
- Provide participating member libraries with free LibraryH3lp software
- Leverage cost savings for members through shared billing and administration provided by MOBIUS, as well as volume discounts based on the combined FTE total of participating MOBIUS libraries
- Provide an opportunity for MOBIUS librarians to work together on a shared user services initiative
- Does not require participating libraries to provide services for other member libraries
- Does not require the administrator in the MOBIUS Office to commit extensive time to coordinate shared staffing provided by librarians at participating libraries

Future opportunities:

- Form a small task force to write an IMLS grant to fund the addition of ChatStaff support for the shared MOBIUS Union Catalog
- Explore whether this opportunity could be expanded to include Prospector Libraries

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