



## AskAway Advisory Committee

Friday, February 9, 2018  
10:00AM – 12:00PM

SFU Harbour Centre, Room 3100  
515 West Hastings Street  
Vancouver, BC

### Committee Members:

Attending in person	Attending via teleconference
Lin Brander, BCIT/Member at Large	Lisa Petrachenko, UVic
Gregg Currie, SC/Chair, Rural Colleges	Sybil Harrison, CC/Urban Colleges
Cameron Hoffman-McGaw, VIU/Member at Large	
Scott Marsden, AC/Member at Large	BC ELN Office
Brenda Mathenia, TRU/Small Universities	Anita Cocchia
Jenna Thomson, SFU	Cristen Polley (recorder)

Regrets: James Rout, BCIT/Regional Universities & Institutes with 4 Year Programs; Lea Starr, UBC

### 1. Adoption of Agenda

The agenda was adopted as tabled.

### 2. Chair's Remarks

G. Currie provided a brief update on AskAway:

- Before the service opened on January 15<sup>th</sup>, eight service providers received training online and in-person at UBC
- On January 24<sup>th</sup>, approximately 20 local coordinators participated in an online meeting facilitated by Katherine Watmough at Thompson Rivers University. Notes and a recording from the meeting were later shared with all local coordinators:
  - At the meeting, C. Hoffman-McGaw and C. Polley provided an update on the committee's action planning work
    - Coordinators liked the prospect of proactive chat
  - Coordinators discussed ideas for raising visibility and promoting the service
  - During the roundtable, coordinators shared recent AskAway activities at their institutions
  - Coordinators would like to meet twice a year, preferably near the start of term
- On January 26<sup>th</sup>, the Admin Centre hosted an online meeting with seven collaborative virtual reference coordinators from across North America
- The Admin Centre is busy pulling together quotes and calculations to demonstrate the value of AskAway in BC ELN's upcoming annual reports

### 3. Expenditure Plan 2018/19

A. Cocchia presented the 2017/18 Projected Expenditure Summary and 2018/19 Draft Expenditure Plan.

#### *2017/18 Projected Expenditure Summary*

AskAway is in a healthy financial position with a significant carryforward as a result of work done by the Admin Centre in previous years to reduce operational costs. It is anticipated that the carryforward will continue to decline over the next few years.

Miscellaneous revenue includes compensation for 2017/18 auxiliary hiring on behalf of libraries unable to staff certain sections.

#### *2018/19 Draft Expenditure Plan*

This year, the Admin Centre is proposing a modest increase of 2% for the Service Support Fee. Annual increases are only applied to the base support fee; flexible support contributions are not increasing. A. Cocchia reminded the Committee that the annual increase of the Service Support Fee varies from year to year (usually 3-5%), depending on circumstances. The Committee has established that regular small increases are preferable to large jumps. This year's 2% increase is sufficient as there is an anticipated carryforward from this year.

A. Cocchia clarified that promotional materials (e.g. bookmarks, etc.) are included as revenue under Miscellaneous and then expended under Governance / Administration.

Last year, College of New Caledonia (CNC) Library requested Extenuating Circumstances funding support in the amount of \$585. At the time, the Committee agreed to support CNC in 2017/18 with the condition that the Admin Centre work together with them on a sustainable solution. A. Cocchia confirmed that the Admin Centre and CNC have an approach that allows CNC to meet their Flexible Support Contribution but does not result in hardship.

It was suggested that Tier 1 institutions could contribute staffing to the Section 4 (July – August) summer schedule if able.

**MOTION:** To endorse the 2018/19 Expenditure Plan, including a 2% Service Support Fee increase.

**Moved:** B. Mathenia

**Seconded:** S. Marsden

**Motion carried unanimously.**

### 4. Action Planning Priorities: Next Steps

C. Polley presented next steps for the action planning priorities.

#### *Review Chat Reference Software and Investigate Proactive Chat*

The last software review was five years ago and since then, available software and service priorities have changed. New features worth exploring include proactive chat, Canadian hosting, and integrated staff chat.

Through discussions with collaborative virtual reference colleagues, the Admin Centre learned that there are three chat software options most commonly evaluated by collaborative services: QuestionPoint, LibraryH3lp, and LibChat.

Suggested next steps:

- Develop a project plan for a software review and present the plan to the Committee for endorsement
  - The plan might include forming a subcommittee that would develop functional requirements and a vendor shortlist, issue an RFQ, and present a recommendation to the Committee
- Explore whether or not AskAway should move forward with proactive chat

The suggestion was made to invite a guest speaker, when appropriate, to speak about the benefits and challenges of implementing proactive chat.

### *Support Libraries in Raising AskAway Visibility*

At the local coordinators' meeting in January, coordinators discussed ideas for addressing this priority. There are challenges to increasing visibility (e.g. little control over the library website), but there are also workarounds that some libraries have implemented (e.g. adding a tab in library pages that pops-out a Qwidget). It also became clear that promotion complements visibility and that both are needed to increase awareness and usage of the service.

Suggested next steps:

- Share one actionable item from the *Minimum Visibility Standards* with local coordinators and include steps to implement it as well as successful examples from libraries
- Create and share informal best practices for promotion and provide ways for local coordinators to share ideas and success stories (e.g. through the AskAway blog, newsletter, brown bag lunch, etc.)
- Explore new ideas together with service providers and local coordinators for raising visibility and promoting the service (e.g. idea of AskAway kiosk)

### *Investigate Options for Evening and Weekend Coverage*

Before moving forward with this priority, the Admin Centre and libraries will need to better understand why these times are challenging to staff.

Suggested next steps:

- Survey partner libraries to learn why these times are challenging to staff and to solicit ideas and gather feedback on possible solutions
- Analyze usage statistics over time to understand how the service is being used during evenings and weekends (e.g. analyze Descriptive Codes to see what types of questions are being asked)
- Talk to collaborative chat reference coordinators to learn how they staff challenging times

Information about how the service is used during these times and why they are challenging to staff will help institutions to best staff these shifts.

Work will begin on this priority as time permits.

The Committee expressed their support for moving forward with all proposed next steps.

## 5. QuestionPoint Software Update

C. Polley provided an update on QuestionPoint enhancements:

- QuestionPoint plans to migrate the service from Flash to HTML5, which will be the foundation for future enhancements
- QuestionPoint's initial focus is on refreshing the chat monitor – to improve efficiency and provide a more contemporary look – according to the following timeline:
  - February 2018: User testing
  - Spring 2018: Development
  - Later in the year: Release new chat monitor
- The Admin Centre has requested to participate in any further user testing of the refreshed chat monitor and is in contact with collaborative chat reference colleagues as well as QuestionPoint to keep up to date on developments
- QuestionPoint is reviewing suggestions for new features (e.g. proactive chat, group staff chat) but will prioritize enhancements that have an impact on the majority of QuestionPoint subscribers

## 6. Best Practices: Handling Citation Questions

C. Polley presented the third in a series of AskAway Best Practices, containing guidelines for how to handle citation questions. 15-20% of questions that come to AskAway are citation questions. By following the best practices, service providers will share a more consistent approach to handling citation questions, students will know what kind of help to expect, and ultimately, they will learn how to cite with confidence. The document was developed based on ideas from local coordinators. Local coordinators reviewed the final draft and shared positive feedback on the document.

The first section of the document discusses the purpose of the best practices and how to apply them. The main body of the document is divided into four sections: basic guidelines for handling citation questions, going deeper with citation questions, handling tricky citation questions, and making referrals. The Appendix includes a list of recommended citation guides and websites and can be updated over time.

Once the final document is ready, libraries that do not have a link to citation guides on their policy page will be asked to add one. The best practices will then be shared with service providers via email, on the staff portal, and in training. Once it has been shared, the Admin Centre will implement the new citation scripts included in the best practices.

The Committee agreed that the best practices will be useful for both new and experienced service providers and will help create consistency in how citation questions are handled on AskAway.

Committee members suggested expanding the appendix and putting out a call for additional resources to add to the appendix, keeping in mind that the appendix should represent various disciplines and be kept up to date without becoming too lengthy.

**MOTION:** To adopt the document, with suggested additions to the Appendix, as an AskAway best practice.

**Moved:** S. Marsden

**Seconded:** C. Hoffman-McGaw

**Motion carried unanimously.**

## **7. New Business**

B. Mathenia brought forward a suggestion to update the scripts that service providers use when chatting with patrons. C. Polley proposed the idea of a survey to better understand which scripts are useful and are regularly used by service providers. Based on what is learned from the survey, the Admin Centre could review and update the scripts.

## **8. Next Meeting**

The next meeting will be held via teleconference in early summer. The Admin Centre will send out a Doodle poll.