

Pandemic as Opportunity: Creating and Implementing a Live Virtual Reference Desk

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Abstract: The COVID-19 pandemic presented the Kennesaw State University Library System with the question, "How can the library maintain live face-to-face reference services in a manner that is safe for all involved?" Challenges to creating a live virtual reference desk that arose included the need to serve two campuses simultaneously, librarians working from home, and using conferencing technology in unexplored ways. The resulting Virtual In-Person (VIP) Reference service was the answer to our immediate situation, yet lessons were learned for future opportunities to push our services beyond the traditional.

Keywords: *reference, COVID-19 response, virtual reference, video assisted reference,*

Blackboard Collaborate



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In May 2020, just two months into the COVID-19 shut down of campuses and their libraries, Dr. Jason Martin, interim dean of the James A. Walker Library at Middle Tennessee State University was asked about the lasting effects the virus would have on library procedures. He responded,

I think we might see a lot more remote working, and changes around how public-facing staff interact with patrons. A lot of combinations are going to be used to ensure the health and safety of staff and people who use the library. (Bandel, 2020, para. 10)

In retrospect, his thoughts were a clear predictor of the steps we took to maintain reference services at the Kennesaw State University (KSU) Library System. Like many other libraries, we were uprooted in the Spring semester of 2020 by the coronavirus. The Research and Instructional Services (RIS) unit hastily assembled our continuation of services at the start of working from home, relying on our reference service components of chat, email, and research appointments to communicate with our community.

As the pandemic restrictions continued and the Spring 2020 semester came to an end, we began to consider our prospects for reference services for the Fall 2020 semester. The library had remained open throughout the pandemic, albeit with safety policies and practices in place—restricted access to physical material, furniture and computer workstations re-arranged for social distancing, group study rooms closed, and computer workstation keyboards and mice available only through check out to allow them to be sanitized. With students returning to campus and the library in the Fall semester, we wanted to be ready for their physical presence. RIS knew that we would continue with our chat, email, and the “now online!” research appointment services, as we had in the Spring semester, but we wanted to support the return to campus for our students with some kind of face-to-face contact that was also safe. Even as reference services expand and morph into the future, we

agreed with Steiner and Madden (2008, p. vi) that “face-to-face contact [was] still a powerful and important facet of the research process,” which we wanted to provide. However, our Dean announced prior to the fall semester that for the safety of all, we would not offer an in-person reference desk in the fall. Due to this, we turned our thoughts to considering virtual services to provide a point-of-need unscheduled reference service that would allow both patron and librarian to maintain safe social distancing.

Commonly used components such as chat and email appear to have become useful reference communication avenues. These convenient services allow the patron to connect to library expertise from anywhere, at any time, and offer ways to overcome any stigma about approaching the reference desk to communicate with the librarian. However, students still prefer talking face-to-face with a librarian (Chesley et al., 2020, p. 7), and at KSU we value being a visible resource for our patrons. The value of interacting with the librarian is because technology “cannot replicate the complexity of human interaction (both knowledge and emotional)” (Vincze, 2017, p. 7).

We were attracted to the use of web conferencing as it “enables ... live online conversations from distributed geographic locations [and] can serve as an adequate substitute for in-person conversations” (Peters, 2009, p. 60). During this pandemic, we searched the internet and found other libraries offering reference through Zoom, Teams, and BlackBoard, but noticed their services were generally appointment-based. At KSU, we already offer a research appointment service to our undergraduate students needing assistance with more complex questions. It was for our walk-in live patrons with ready reference-type queries that we wanted to develop our virtual reference desk.

What We Wanted to Do

We wanted to make this virtual reference service as close to an in-person reference session as possible: A patron walks up to the Reference Desk and asks the reference librarian their question(s), and the reference transaction begins. Our colleagues at Valdosta State University had just launched their own virtual reference desk using a one-to-one video reference service setup (Paul, 2020). We began to build on their example to create a virtual service that would provide the personal one-on-one contact traditionally provided in face-to-face reference.

Because KSU has two, physically separate campuses and libraries, our in-person video reference service needed a more involved set-up. To provide person-to-person reference service at both libraries, we planned to have one workstation at the Sturgis Library on the Kennesaw campus and another at the Johnson Library on the Marietta campus. These two separate reference workstations would be connected to a third remote computer. This third computer would be used by the reference librarian to provide person-to-person reference to both campuses. (Staffing shortages stipulated we would use one reference librarian for both libraries instead of one librarian at each library).

Creating the Technology Picture

Using Blackboard Collaborate Ultra (BBCU) software, we were able to create Virtual In-Person Reference services (VIP, for short). It is conducted through a single live session that can be monitored remotely by one reference librarian while allowing two patrons—one patron from the Kennesaw library and one patron from the Johnson library—to interact with the reference librarian.

Each campus VIP workstation allows students to view the reference librarian and speak with them directly. The reference librarian can also share their screens to provide instruction and to share the library catalog and databases with patrons during the reference session.

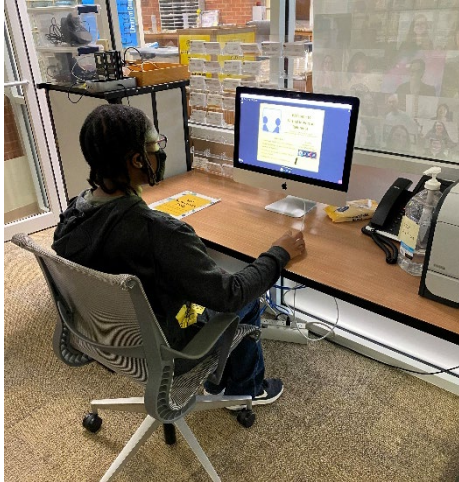


Figure 1. VIP workstation



Figure 2. VIP workstation

In our unusual “one-librarian-to-two-reference-desks” situation, we found that we could use the Breakout Group function in BBCU to allow one reference librarian to monitor two reference workstations by creating a unique BBCU VIP Classroom. The Sturgis Library reference workstation was signed into this VIP Classroom as “Sturgis Patron” and was left in the default VIP Classroom (BBCU Main Room). The Johnson Library reference workstation was signed into the VIP Classroom as “Johnson Patron,” and was moved to a BBCU Breakout Group named “Johnson Ref Room.” This setup allowed one reference librarian to provide reference service to two patrons, on two campuses, while maintaining the privacy of each reference transaction.

In practice, the VIP reference librarian stayed in the BBCU VIP Classroom (BBCU Main Room) monitoring the Sturgis Library reference workstation feed. This was done because the Sturgis Library historically has more patron traffic and more reference desk transactions. At the Johnson Library VIP reference workstation, signs were posted directing patrons to use the BBCU Raise Hand function to get the attention of the reference librarian. When the VIP reference librarian in the BBCU VIP Classroom (Sturgis Library) received a hand raise notification from the BBCU Johnson Ref Room (Johnson Library feed), they posted a “be right back, helping another patron” sign in the VIP

Classroom and moved to the Johnson Ref Room Breakout Group to help the Johnson patron. While not an ideal situation because of the wait times to get reference help, this set up provided the best option for our situation.

**Welcome to
Virtual In-Person
Reference**

A KSU library reference service using
video conferencing to interface with a live librarian.

**The Virtual In-Person librarian is currently assisting another patron
and will be back shortly. Sorry for the delay.**

Wait too long? Immediate Chat Reference Help is Available

- Go to any any other computer/web enabled devise—**DO NOT use this computer**
- Go to the Library website (library.kennesaw.edu)
- Use the Chat box for live librarian assistance
- **DO NOT use this computer for Chat Reference or any other purpose**

We're available. Chat now!

Figure 3. VIP Hold sign

Hardware Considerations

Both reference desks already had Apple iMac computers workstations with built in cameras that could be used for VIP reference, so no additional hardware was needed. One hardware issue that needed to be addressed was the use of keyboards and computer mice at the reference desk computers. We did not want to create a contamination hotspot by having multiple patrons use the same keyboard/mouse and we did not want patrons to use the designated reference computers for any other purpose. Also, we did not want to ask already-busy access services staff to clean the VIP hardware after each patron use. After considerable discussion, we elected to remove both the keyboard and mouse from the Sturgis Library VIP reference computer and remove the keyboard but

leave the mouse on the Johnson Library VIP reference computer. Since VIP reference librarians were monitoring the video and audio feed from the Sturgis Library VIP reference computer, neither a keyboard or mouse were needed; Sturgis patrons could simply walk up to the VIP computer and begin speaking. In contrast, Johnson Library patrons needed to notify the reference desk librarian they needed assistance by using the Hand Raise function since they were in a separate BBCU Group Room, so a mouse was needed at the Johnson workstation.

To make this dual-computer setup work, graphics were created to notify patrons of the librarian's location—either present and ready to assist or in another room assisting another patron. Since the reference librarian remained in the BBCU Main room watching for Sturgis patrons, a graphic was posted in the Johnson reference breakout room that read, “Welcome to Virtual In-Person Reference. Notify the librarian you want assistance by clicking the Hand Raise icon. The librarian will be with you directly. Thank you for your patience.” When the reference librarian saw the hand raise icon from a Johnson patron, they posted a graphic in the BBCU Main room (Sturgis library) that read, “The librarian is currently assisting another patron and will be back shortly. Sorry for the delay.”

This hardware set up has worked well. VIP tech support librarians at each campus log on to the VIP reference computers each morning using keyboards and mice kept separate from the workstations. Once logged in, the VIP tech support librarians log in to the BBCU VIP Classroom as the appropriate virtual patron and make sure the video and audio feed from the VIP reference computers are on and working. Once all is set, the keyboards at both libraries and the mouse at Sturgis are then detached and stored out of sight. The Johnson VIP reference workstation directs patrons to use the available hand sanitizer to clean their hands before and after using the mouse on the Johnson VIP reference computer.

Training in the Technology and Process

Training was a team effort as training processes and materials needed to be developed quickly. Trainers had no prior experience in using BBCU in this way and, frankly, we did not know if these procedures would work as we intended since the VIP hardware setup at each library was one of the last elements finalized. We did as many live trials and tests in advance as we could but knew unanticipated issues would pop up, so we planned a VIP evaluation session to take place two weeks after the service went live and set up a VIP Suggestion Box for our reference librarians in Microsoft Teams.

VIP training included live synchronous online training sessions for all librarians scheduled to work VIP reference and was led by our Reference Engagement Group (REG), a sub-unit of RIS, who had conceived the idea and created the procedures. After this training session with all VIP librarians, REG members met with each VIP reference librarian individually to review VIP procedures and best practices and help clear up any confusion and lingering questions. These individual sessions proved to be invaluable in solidifying VIP procedures and correcting inefficient practices. In addition to the group and individual training sessions, VIP procedure reference material and documentation were created by REG members for VIP reference librarians use.

Going Live

The VIP Reference service went live on the first day of the fall semester in August 2020. While the technical launch was successful, challenges were identified as the semester progressed. To help identify these challenges, input from the VIP Suggestion Box and a REG evaluation meeting held two weeks after the VIP reference service launch led to several practices and procedural changes. As

with many new services, some issues were able to be addressed and fixed quickly, while others took longer to discuss and resolve.



Figure 4. VIP signage

The most common critiques from the VIP librarians addressed concerns around feeling “on display” and the perception of spying on students. To resolve this concern, librarians were encouraged to create “Welcome” graphics that included their picture and a brief message letting the students know that they were available to answer their questions. Librarians were directed to personalize their slides—versus using a template—to continue to build librarian buy-in.

The Welcome graphics also provided a solution to another issue that arose after the launch. One recurring technical issue identified during the first week of operations was personal internet connection. As many of our librarians were working at home during their shifts, intermittent home internet connection would cause lag or drop the service entirely. Once the Welcome slides were put in use, and librarians were able to turn off their camera when not working with a student, lag became much less of an issue. Librarians also shifted their in-office workdays to match their VIP shifts when possible, to ensure that they would have access to a more reliable internet connection during their shift.

Along with the internet connection issue, the VIP service ran into BBCU platform failures despite several test runs prior to the launch. The platform connection on the user side in the library was reported to crash or spontaneously reboot by several members of the team. Unlike the internet issue, this challenge required outside help from the KSU University Information Technology Services (UITS) department, who were able to identify the glitch and provide a solution within the first few weeks of classes. While waiting for issue to be resolved, the VIP Tech back up team from RIS were notified via Microsoft Teams chat and provided a quick fix.

UITS were also extremely helpful with another consistent technical glitch caused by improper use of the workstation. Despite visible signage informing students of the computer's intended purpose, many students would choose the VIP workstation for their own use. Occasionally the VIP librarian on duty would see this about to happen and be able to catch them before they did. If they were unable to, the VIP Tech on duty was informed and would relaunch the platform and provide information about the service to the student when possible.

Another adjustment to the VIP service involved the service schedule. Since the service was new and the start of the semester was traditionally a busy time at the reference desk, the Reference Coordinator started with scheduling two librarians during peak hour shifts (10:00 am–2:00 pm). The intent of this duplicate coverage was to minimize the stress created by the launch while navigating alternative work situations. In preparation for potential shifts in service need, the Reference Coordinator and RIS Director set up check points throughout the semester to review usage statistics and adjust coverage as needed. After the first check point occurred, the reference team was able to identify a reduced need for in-person reference assistance and adjusted the schedule. This was useful as it avoided the use of excess staffing and lost time on other RIS projects.

The Road Ahead

As the library prepared for the Spring 2021 Semester, the unit was confident in continuing the VIP service for many reasons. First and foremost, it provided the librarians with the ability to continue to serve the students in an environment that is both safe for students and our staff. It has also helped address an existing service inequality issue between the two campuses. VIP Reference has demonstrated a way to potentially provide equal service on each campus while facing staffing shortages at a designated reference desk. While we may not continue to use VIP exactly as it is today when the library returns to normal, we plan to incorporate the lessons learned from the development and implementation of the service.

These benefits have also encouraged the unit and library leadership to take another look at how reference as a service is provided across the library system. It has presented important questions to consider when creating a vision of the future of reference services at our institution, including:

- What is our desired ROI (Return on Investment) when providing reference service?
- What is the purpose of reference for our students, and are we meeting that goal?
- Are there other ways to meet that goal?
- Are there other digital options we should explore?

The pandemic has presented academic libraries with many challenges but has also provided us with unique opportunities to push ourselves outside the box. We have discovered, as Dr. Martin predicted, that “a lot of combinations are going to be used to ensure the health and safety of staff and the people who use the library” (Bandel, 2020, para. 10). This experience has shown us how adaptable our students, faculty, and librarians can be.

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