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# Connecting to Students: Launching Instant Messaging Reference at Binghamton University

Elizabeth Brown, Sarah Maximiek, and Erin E. Rushton

## ABSTRACT

Binghamton University Libraries implemented an IM reference service using the Trillian client to monitor multiple IM accounts at two distinct reference service points. This paper addresses the process and practical considerations of implementing the service including selection of the appropriate software, creation of IM accounts for each service, development of a staffing schedule, and training of reference staff. Also included is an outline of future plans for improving IM services for students and academic library users.

**KEYWORDS:** Instant messaging, virtual reference, reference services, chat, academic libraries, Trillian

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## **INTRODUCTION**

Recent studies have shown that instant messaging (IM) is increasingly becoming the preferred communication method for students in colleges and universities (Shiu 2004, 20). Some academic libraries have responded to this trend by offering IM reference in conjunction with other walk-in and virtual reference services. In 2002, Marianne Foley described the University at Buffalo library's experience implementing a pilot IM reference service using AOL (Foley 2002, 36-45). However, despite the growing prevalence of IM reference, there has been little guidance on how to implement an IM service in academic libraries. This is not to say that IM has not been discussed in the literature. Schmidt and Stephens wrote about the significance of instant messaging to libraries and librarians (Schmidt and Stephens 2005, 34-35). Abram's article (Abram 2004, 40-42) highlighted the advantages of IM communication. Comparison of IM to other types of chat services was explored by Houghton and Schmidt (Houghton and Schmidt 2005, 26-30).

## **BACKGROUND**

Binghamton University, part of the State University of New York, is a graduate-degree granting research institution, with a 2004 enrollment of approximately 14,000 students. The Binghamton University Libraries consists of the Glenn G. Bartle Library (commonly called the Bartle Library), which serves the humanities, social sciences and fine arts, and the Science Library, which serves mathematical sciences, computer sciences, engineering, and physical and life sciences as well as nursing and psychology. The Libraries provide leadership to the university community in accessing and using information resources for teaching, learning, and research.

The Libraries primarily serve students, faculty, and staff but, as a public institution, the Libraries are also open to the community at large.

The Libraries introduced its first chat service in the summer of 2003 using QuestionPoint software. In summer 2004, a move was made from QuestionPoint to Docutek VRLPlus software. We found these two software products complex, requiring considerable time in staff training, and often loaded with features staff did not use. Technical and security issues prevented the loading of the software on local servers. The reliance on remote servers led to very slow loading times and frequent connectivity failures with the products. The low traffic activity with these services was attributed to the unfamiliar product interfaces for the user and recurring connectivity problems. Consequently, staff did not use the software frequently enough to become completely comfortable with answering questions in this environment.

These shortfalls and overall dissatisfaction with commercial software motivated us to investigate other mechanisms for providing chat services. A 2004 report, *How Americans use Instant Messaging*, by the Pew Internet and American Life project, indicated that IM was becoming the preferred form of communication among college students (Shiu, 20). With this knowledge, the library administration created an Instant Messaging Task Force in March 2005. The task force was composed of three reference librarians with oversight from the Head of the Science Library and the Head of Electronic and Reference Services from the Bartle Library. They were asked to investigate the possibility of offering an IM service to supplement or replace the existing service. The planning and implementation of the service took place between March and June 2005 and required several steps including selection of the appropriate software, creation of IM accounts for the different online services, development of a staffing schedule, and training for reference staff.

## **SELECTION OF IM SERVICES AND SOFTWARE**

It was first necessary to investigate the IM services available and decide which ones to use. The following criteria guided our investigation:

- compatibility with Macintosh and Windows
- security
- ease of use
- popularity with university students and staff
- availability of useful features (e.g. transcripts, scripted messages, statistics, etc.).

The Pew Internet and American Life Report reported the most popular IM service among college aged students was AOL followed by Yahoo! and MSN (Shiu, 4). Our observations of students using IM in the Libraries supported these findings. We therefore decided to offer IM reference for all three services. We found AOL, Yahoo! and MSN to be similar in many respects. Each service required individuals to sign up for an account using downloadable software. However, once created, the IM accounts could be accessed using the software or through a web-based application that allowed individuals to use the service without downloading the software.

There were challenges in offering multiple IM reference services. Our Libraries' IT staff was concerned about security and maintenance issues involved with downloading three different software programs. It would have also been impractical to manage the web-based applications or downloaded IM software at the service desk because of the multiple login IDs and open programs. What we needed was a multi-protocol instant messaging (IM) client that could monitor multiple IM services and accounts with a single interface. There were several programs available including Trillian (<http://www.ceruleanstudios.com/>), Gaim (<http://gaim.sourceforge.net/index.php>), and Miranda IM (<http://www.miranda-im.org/>). After reviewing the programs, we selected Trillian as the platform to monitor AOL, Yahoo!, and MSN

from multiple computers in the library network. Trillian had a number of beneficial features including:

- support for AOL, MSN and Yahoo! IM services
- file transferring and sharing
- support for group conversations
- automated transcript saving
- alerts for new IM messages and users
- easy insertion of emoticons and images
- notification when the respondent is typing to answer an IM
- displaying connectivity to accounts in the system tray.

In addition to these usability features, Trillian was available as a free client and proved straightforward to install. We were easily able to customize Trillian to load upon start-up and save message transcripts to a secure location on the Libraries' internal network. This feature was critical, as the IM reference service was to be monitored from multiple computers in the Libraries.

## **SETTING UP IM ACCOUNTS**

Six accounts were created for the Bartle and Science Libraries, with each Library having one account on AOL, MSN and Yahoo! The screen names needed to be consistently named across all three providers, and also recognizable as a library location affiliated with Binghamton University. BUmainlib for the Bartle Library and BUScilib for the Science Library were chosen as screen names as they satisfied the criteria.

## **STAFFING THE SERVICE**

Librarians, reference staff, and student assistants monitor multiple reference services from a single service point in each library. There was concern that adding IM to these services might compromise the quality of walk-in, phone, and email reference transactions. However, assigning

IM duties to staff outside of reference shifts would have been problematic due to staffing levels. At the service desks, multiple reference staff members are available at peak hours so we felt that they could absorb this additional service. On evenings and weekends, the service desks are covered by only one reference staff member. With these considerations, the IM service was added to the existing reference services as a pilot service. We felt if the volume of IM transactions became too high to effectively manage at the service desks, the service location could be reconsidered.

We also felt it was important to have the IM service offered in conjunction with other reference services. However, the Science Library had a smaller number of staff and consequently offered fewer reference hours than the Bartle Library. It was not desirable to have a different set of hours for each library. Therefore, we decided to share the IM hours between the two service desks, with the Bartle Library staffing the service for the Science Library early in the morning and later in the evening during the workweek, and the Science Library monitoring Bartle accounts during the weekend reference hours. Email alerts were set up at each service desk to remind staff to sign into accounts at the appropriate time.

## **TRAINING**

Since BU Libraries had offered chat services in the past, many reference staff were familiar with using virtual reference services. However, as few were comfortable with this newer IM environment, a training session was held. At this session we spent time discussing conventions and practice in IM culture and also highlighted “chat speak,” such as frequently used

abbreviations and expressions. To demonstrate a typical IM conversation, we showed a transcript from one librarian with her college-age sister regarding the research process. Despite her sister's conviction that research papers were "stupid", the librarian had conducted a successful reference interview by communicating in short, brief messages and refining the interview to guide the user through the appropriate steps in creating a class paper. The conversation also demonstrated that formal grammar and spelling were not always necessary to get the point across.

Instructions for downloading and installing the Trillian software were also provided. We demonstrated signing onto accounts, adding contacts, and checking and changing account status for reference staff in the Libraries. The session concluded with participants practicing IM conversations among themselves. After the session, members of the IM Task Force helped staff install the Trillian software on their computers. Staff were encouraged to sign up for personal IM accounts and communicate with each other via IM to gain familiarity with the software.

## **CREATING A WEBPAGE**

A new *Ask a Librarian* webpage was created with a section for the IM service. We provided a short description of the service, the account names, and hours of operation. *An Instant Message a Librarian* webpage was also created and this linked to the *Ask a Librarian* webpage. This page (<http://library.lib.binghamton.edu/webdocs/IMpilot.html>) included information on the pilot service and instructions on how to access the web-based IM applications.



## **LAUNCHING THE PILOT**

The IM pilot service was launched in June 2005. A summer launch date was desirable to give reference staff time to become comfortable with the service before the fall semester began.

Since Trillian had been configured to load automatically at the reference desks, there were few changes in procedures. Reference staff were trained to check Trillian at the beginning of their shifts to ensure the IM accounts were connected. Members of the Task Force oversaw the service and addressed any staff concerns during the first few weeks of the pilot.

The IM pilot service was marketed in several ways. It was featured on the Libraries' homepage and blogs. An article describing the service appeared in *LibraryLinks*, the Libraries' newsletter. The service was also highlighted in a "What's New in the Libraries" exhibit. When the Libraries' website was redesigned that summer, it linked to the new *Ask a Librarian* webpage in the banner. This banner appears on the top of each library webpage including *metaLINK*, the Libraries' federated search engine.

## **DISCUSSION**

In early fall, the IM Task Force completed its charge and was amalgamated with the Digital Reference Committee (DRC). The DRC was charged with managing and evaluating all facets of digital reference including the IM reference service. The DRC has used observations and feedback from reference staff to assess and evaluate the service so far. The observations and feedback are discussed in this section.

Free IM services offer limited technical support and have little incentive to provide extensive customer service. This means service interruptions and disconnections can be difficult to identify and correct. The web-based IM interface is not robust, and users may have problems completing IM sessions or adding contacts to their screen name lists. Fortunately, our library has available an in-house technical support team. This team has offered the Task Force guidance and technical support. We believe the support of the Libraries' IT staff is vital in establishing and maintaining consistent IM support for users.

The questions received through IM are varied. The most common types of questions asked in sessions concern general library information and services (ILL, hours of operation, reserve materials) and locating specific books and journal articles for projects. In-depth reference questions requiring subject expertise and knowledge on using library resources are rare, as are requests for directional information and general campus information.

The length of an IM session length can vary tremendously depending on the type and number of questions asked by the user. Brief sessions lasting a few minutes often involve a specific request and once the answer is given the session ends. Some IM sessions are prolonged due to additional questions from the patron or from reference staff who probe patron requests and ask more specific questions to discern what is needed. The desire to conduct a formal reference interview in this medium can make it difficult to provide quick answers to questions. Sessions are also prolonged as responses in IM sessions tend to be descriptive as reference staff offer detailed descriptions on how to navigate the library website or conduct searches online. In other words,

librarians are not simply sending the IM user answers but are using teachable moments to demonstrate how to identify and locate information.

IM user behavior tends to be consistent in several ways. Many IM users are comfortable waiting a short period of time for help. Occasionally, IM users have left the session without saying good-bye or providing other cues that the session is over, and the reference staff member is left waiting for a response from their last query. IM sessions are often peppered with chat speak, but so far the prevalence has not been so high that staff find it difficult to understand the patron. This may be because users temper their use of chat speak in awareness that they are speaking to someone outside of their usual peer group. Also, despite some initial concerns, we have not experienced any inappropriate or abusive IM sessions that may cause us to rethink our policies. Users are respectful of reference staff in IM sessions.

The service is marketed specifically to the campus community. However, since no authentication is required to initiate an IM session, the service is available to anyone with an IM account. Unless information is given during a session, the identity of a patron using IM is unknown. Reference staff usually do not ask the user of their status unless they are being directed to a campus service or licensed database.

The reference staff's familiarity with the IM environment and comfort with using IM can impact the quality of IM reference service. Some librarians have felt pressure communicating quickly and informally with IM customers. However, as reference staff have become accustomed to the service, these pressures are handled much the same as a queue at the reference desk or a demanding user. It appears that the biggest challenge for reference staff is the managing of

multiple services (answering questions from walk-in patrons, phone calls, emails, and IM sessions) at the desk, particularly if only one reference staff member is at a service point.

## **FUTURE STEPS**

As with many new initiatives, more work is needed to improve the effectiveness and quality of this service. Some areas identified include marketing the service effectively, evaluating session transcripts to measure quality of service, learning more about our IM audience, and refining policies that address privacy and other concerns.

### Staffing

The appropriate level of staffing depends on the number of IM sessions received, level of traffic at the service desks, and length of each session. Another consideration is the comfort level of each reference staff member with both the IM service and multi-tasking. As the popularity of our service grows, we will monitor the feasibility of continuing to staff IM at the service desks. One alternative model is to have staff monitor the service in their offices, as has been done outside of peak hours in the Science Library. Scheduling and ensuring consistent monitoring of the service might prove to be more difficult in the Bartle Library, due to the higher number of staff and the more frequent shift changes.

Another consideration for our future staffing is the arrival of an Information Commons in the Bartle Library, which will be served by a combined desk, featuring both Reference and Computing Services. While we are not planning any changes to the service immediately, we are aware that this new service point might pose some challenges in staffing our IM service at the reference desks.

## Marketing

Plans have been made to market the service more fully to the university campus. We are encouraging librarians to promote IM reference to students and faculty during instruction and orientation sessions. Library bookmarks were also recently revised to include the *Ask a Librarian* web page. Other options being discussed include advertising in student publications and dining areas and working with other groups in the Libraries to increase the branding and visibility of IM on the website.

## Assessment

The DRC is currently planning a transcript analysis of all IM sessions. An evaluation form has been created to help the committee gather statistical data from transcripts including average length of sessions, peak hours and peak days. The form will also collate information about user demographics, type of questions received and sources used to answer questions. It is anticipated that an analysis of questions can demonstrate ways the Libraries can provide better access to materials. Also, by reading the transcripts, the committee hopes to gain insight into the reference staff's comfort level using IM and identify further opportunities for training. The Libraries' Assessment Committee conducted a mini survey on instant messaging to gauge user awareness and satisfaction of the service. Out of the twenty responses, only four had used the service. Of the fourteen undergraduates who had not used the service, none of them knew about it. This suggests that the service needed to be promoted more widely. The low response rate meant that any analysis of the data was anecdotal at best and cannot be taken as indicative of how the campus as a whole uses instant messaging or views the IM reference service.

## Target Audience

There was an expectation when the service was launched that the primary user groups would be undergraduate students. Although it may not be possible to verify this, the DRC hopes that the IM survey and transcript analysis will help identify which demographics are using the service. The DRC may explore marketing options and alternative IM or chat services to reach out to under-represented segments of the campus population that are not active or comfortable with free IM services.

## Privacy

Binghamton University's Privacy Policy

(<http://computing.binghamton.edu/policies/privacypolicy.html>) states that in some instances personal information may be collected but not disclosed. The Libraries' Reference Services Privacy Policy (<http://library.lib.binghamton.edu/webdocs/policies.html#referenceprivacy>) clarifies this stance in relation to reference transactions. Patron questions may be saved and shared by staff for training, or to populate a "Frequently Asked Questions" database. All identifying information from questions will be removed. Our policy also reminds users that IM providers have their own privacy statements, and we are not liable for how they use this information. Since transcripts can contain identifying information such as screen names, the DRC has limited access to the saved transcripts folder to committee members only.

## **CONCLUSIONS**

Six months after the service had been launched, over 200 individual IM questions had been answered. Although an evaluation of the service has not been completed, anecdotal evidence

suggests that IM users are pleased with the service. We have also noticed an increase in repeat users suggesting that some IM users have added us to their buddy lists and are contacting us at their convenience. As discussed previously, future work is needed to improve the effectiveness and quality of this service. In many respects the IM service has been “learn as you go” experience, and, through planning and managing the IM service, the Digital Reference Committee has learned many lessons.

Habituating reference staff to regularly connect and monitor the IM accounts during a shift has been an issue. Reminders have been created through the reference desk’s Outlook Express accounts but this has not always been effective, especially during intersession and off-peak hours.

The integration of IM into existing reference services can create difficulties in setting consistent service priorities. There can be an attitude from some reference staff that IM is an “add-on” service and less important than walk-up patrons. Clear guidelines need to be established for prioritizing the different varieties of reference transactions. We hope that the transcript analysis project will raise reference staff’s awareness of the growing use of IM and its effectiveness in reaching new library users and meeting the information needs of established users.

Providing and maintaining two IM accounts creates a higher level of service and reinforces that there are two libraries present on campus. However, IM users don’t always differentiate between the two accounts. Frequently a science question is asked at the main library’s IM account and

vice versa. The Binghamton University Libraries have differing physical layouts and subject specialists at each location, but IM users don't see this difference in a virtual reference setting.

Librarians are using IM to communicate with each other internally. This provides another avenue to reach someone and is usually quicker than email. IM accounts can also be used as an additional mode of outreach for reference librarians and bibliographers. They can be given out to students during instructional sessions, used for providing individualized reference service, and as an additional means of contact through email signature files and business cards.

Migrating from commercial virtual reference software to IM presented new training challenges. Some reference staff found the informal environment and fast pace of sessions stressful. Because it is difficult to create a training environment that mimics the actual or "live" IM environment, not all staff felt prepared to answer IM questions. Our observations indicated that reference staff who successfully integrated IM into their daily workflow found it easier to adapt to this new environment.

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