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Biography

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A big Ask! reference, time zones and the art of cooperation

Abstract

The AskNow! virtual reference service was recognised in the recent United Nations Global E-government Readiness Report as being an outstanding example of international best practice. The service is operated as a consortium which includes the National Library of Australia, Australian state and territory libraries and the national libraries of Singapore and New Zealand. It spans several time zones, is staffed by more than eighty librarians, is typically inundated with enquiries on an unlimited range of topics and is widely acknowledged as one of the busiest and most successful online reference services in the world.

It is moreover, the first and only Australian venture to involve reference librarians in a collaborative effort on such a scale. The key to its success is the achievement of a cooperative service arrangement between professional colleagues across three countries.

The paper addresses the benefits, challenges and constraints involved in the cooperative service model from the vantage point of both librarian and client. In a broader context it offers some accumulated wisdom on the operational complexities of virtual reference, cooperative ventures, international cooperation and the embracing of new technology.

Introduction

An initiative of the Council of Australian State Libraries (CASL), AskNow! began operation as a pilot virtual reference service in August 2002. It had the distinction of being both Australia's first nation wide chat reference service and an unprecedented exercise in reference collaboration between all Australian state and territory libraries. Recognised most recently by the United Nations in its Global E-government Readiness Report (2005) as being an outstanding example of international best practice, the service has also been acknowledged by the Australian Government for its contribution to e-government agendas (NOIE, 2003), commended in the Senate enquiry report Libraries in the online environment (2003) and awarded a 2003 Victorian Arts Portfolio Leadership award. Four years and over 120,000 questions down the track, AskNow! is an ongoing and very popular service. It has expanded beyond the state libraries and the National Library of Australia to include fifteen public libraries, the National Library of New Zealand and the National Library Board of Singapore.

Virtual Reference: an overview

Virtual reference is a qualified solution to the imperative to break down access barriers and to respond to the information seeking behaviour of our increasingly web literate client base. Library advocates have welcomed the opportunity provided by the customised chat software to deliver a 'live', interactive reference service whose salient features are convenience, immediacy and ease of access. Within the Australian AskNow! collaborative an additional - and particularly important -

principle is that clients can reach us from anywhere and that we make no exceptions about who uses the service.

An analysis of the 2006 AskNow! exit survey responses is revealing in relation to what users like about virtual reference. Much of the feedback is positive, many patrons describing the service as quick, useful, efficient and helpful; others commenting that our librarians are friendly and that they have succeeded when independent searching has been unproductive. Many indicate an intention to use the service again. In fact, the majority (53%) of questionnaire respondents are repeat AskNow! clients and 69% rate the service as excellent or very good. This enthusiasm is also reflected in comments by focus group participants in AskNow's 2006 evaluation in which the advantages of virtual reference are identified as being its convenience, speed of response, capacity to save time, access to a high level of professional assistance and the opportunity provided to focus exclusively on the question:

I have spent several days looking for this information it was terrific to get someone who knew what I wanted. My local library is great, but compared to being able to access a real, live librarian in my own lounge room – well there is no comparison, is there?
(AskNow! Evaluation, 2006)

The niche for virtual reference

It was recognised from the outset that virtual reference is merely one option in a suite of reference delivery services and that it is an extension of, rather than a replacement for, traditional reference services offered via the desk, phone,

email or web form. The placement of the AskNow! logo on the web pages of participating libraries amongst their other Ask Us options reflects this view of the service:

What a fantastic service! It is a great complement to the 'face to face' services at the library. The immediate answers will speed up my research considerably.
(*AskNow! Exit Survey, 2005*)

It could be said that the niche advantage for virtual reference is a combination of three characteristics: its ability to respond to an information request at the point of need, to provide a platform for an interactive exchange which simulates the reference interview and to bring relevant web resources, almost instantaneously, to the screen of the remote patron. An additional advantage consistently documented in user surveys is the anonymity factor appreciated by patrons who feel intimidated by physical reference desks or who have a disability which makes the transaction difficult:

I really find this service extremely helpful for me as I am not able to ask questions easily face to face. It makes my life less stressful.
(*AskNow! Evaluation, 2006*)

I am impressed that this is made possible...especially for people who are deaf and have absolutely no telephone contact, which makes it extremely difficult.
(*AskNow! Exit Survey June 2006*)

From the librarian's standpoint virtual reference offers an opportunity to reach non traditional library users, to extend the equity principle in relation to the delivery of reference services and to

confirm the library's technological relevance. In terms of functionality, the potential it offers to demonstrate search techniques and the use of specific web based resources via a co-browsing facility gives it a unique advantage in support of independent lifelong learning initiatives.

Virtual reference in operation

The essential features of standard virtual reference software provide for a synchronous transaction between librarian and client. They allow the librarian to conduct a reference interview via a chat facility, to push relevant web pages in response to a question, to co-browse (or view a website simultaneously with the patron) and to send scripted responses or stored URLs. At the close of the session patrons who provide an email address receive a transcript of the session which includes links to web pages sent by the librarian. Users also have the opportunity to respond to a linked or popup survey which is available at the end of the session, a feature which is an important asset in terms of evaluating the service and software functionality.

Librarians operating in the AskNow! service are generally working to full capacity, the busiest periods coinciding with the academic year when it is not unusual to receive over one thousand questions a week. Weekly activity is spread over fifty hours of operation while the service is open 9am to 7pm Australian Eastern Time. This varies from 11am to 8pm for those in New Zealand, to 6am to 3pm in Western Australia, depending on daylight saving. It is acknowledged that the volume of questions is such that the service needs to be a dedicated operation - in contrast

to some overseas services where virtual reference is combined with rostered desk or phone duties.

Given that a high proportion of AskNow! clients are young people (60% are aged under 24 according to data available from Exit Survey responses), operators are conscious of the need to be consistent with the information literacy principles which influence traditional reference services. The emphasis, particularly where an assignment topic is involved, is on sharing information about search strategies, providing suggestions and relevant example web pages and promoting the use of authoritative web resources. The opportunity is also taken, where appropriate, to promote print resources and the use of tertiary, public and school libraries.

Although the use of commercial databases is an important dimension in the mix of recommended resources, licensing contracts and copyright provisions often prevent the direct transmission of articles to virtual clients. AskNow! librarians work within this limitation by sharing information about which databases are available on a statewide basis through the AskNow! administration website. This means that recommendations about relevant databases and associated search strategies can be based on an awareness of which electronic resources are available to the enquirer. In the future it is hoped that a National Licensing Proposal will enable library clients to access a core set of authoritative online information sources through many Australian libraries.

AskNow! as the virtual equivalent of a ready reference service, operates on the basis that most enquiries will be responded to within, roughly, ten minutes. Where a question is obviously beyond the capacity of the service, operators offer to refer it to their email enquiry service, or that of another participating library for follow-up. The exceptions to this arrangement are homework related enquiries and those where the associated research is dependent on the exclusive resources of an individual library. The 'reference without (state or country) borders' principle which applies here is an instance where the cooperative arrangement works particularly well in supporting the interests of virtual clients. Indeed a valued aspect of the service identified by respondents to AskNow's 2006 Evaluation Survey is the fact that the service is national, that 'clients [have] access to the resources of all the libraries in Australia' (AskNow! Evaluation, 2006).

A collaborative tradition in virtual reference

In the international sphere collaboration and cooperation are critical elements in the professional network which informs and supports virtual reference initiatives. One collaborative venture which dominates the current virtual reference landscape is QuestionPoint. In addition to its service and proprietary software product, it provides access to a huge professional network of reference librarians through the option for referral of questions to its Global Reference Network. At this point over 1,700 libraries in twenty-three countries use QuestionPoint software. Of these, 900 libraries in three countries participate in a virtual reference 24/7 cooperative

which allows for automatic routing of questions to accommodate differential time zones and subject specialisations. AskNow! - which began using QuestionPoint chat software in March this year - operates as an independent Australian cooperative with access to QuestionPoint's training and international discussion forums.

Although the virtual reference literature is largely dominated by the US experience, evidence of successful collaborative services in other parts of the world suggest that virtual reference is well on the way to achieving mainstream status as an additional form of reference delivery. In Europe for example, collaborative services currently exist in Denmark, Finland, Germany, Lapland, the Netherlands, Norway, Spain, Sweden and Switzerland (Larsen, 2006). Virtual Reference Canada is another example of an interesting model in that it is a collaborative of public, government, university and special libraries throughout Canada. In Asia, China's Virtual Reference Desk, a multi-type collaborative, allows its users to direct their questions to any one of fifteen subject specialists and in Singapore, Reference Point includes its Community Children's libraries in a collaborative administered by the Library Board of Singapore.

Of particular interest to us in Australia is the Enquire virtual reference service, a collaboration of approximately one hundred libraries throughout England. The service uses the same QuestionPoint software and links to the 24/7Reference Cooperative to provide a twenty-four hour service. There are also some highly successful models within

our own region. Chasing the Sun is a collaborative venture between Australian and UK medical librarians which offers an after hours reference service, provided for by time zone differences, to clinicians who need information urgently in relation to patient care. Another example of international collaboration, this time in the public library sphere, is answers now, a partnership between the Brisbane City Council Library Service and a number of overseas libraries. It was the first Australian instance of an internationally based, 24/7 virtual reference service.

The case for cooperation

The cooperative model of virtual reference is frequently characterised as a sustainable solution for the problems which have beset some independent virtual reference services. In this regard Coffman and Arret's widely publicised, two part article, To chat or not to chat (Coffman & Arret, 2004a, 2004b) provides a relevant context in which to explore the rationale for offering a collaborative service. The problems Coffman identifies - unsustainable cost of software licences, diversion of resources at the expense of other services, uneconomic staffing commitment and low usage - have, in the case of AskNow! been largely overcome through the economies of scale achievable in a cooperative arrangement. Also relevant to the sustainability issue is the fact that, in contrast to most of the services mentioned by Coffman, AskNow! is not dependent on grant funding for its survival.

On a practical level both the sharing of costs associated with licensing commercial software and the significant

reduction in staffing contributions for member libraries have been critical to the viability of the AskNow! service. Within the collaborative arrangement cost sharing has been refined as a three tiered system based on the size and operating budgets of participating CASL libraries. Participants currently pay between \$4,100 and \$1,300 pa. The same principle has been applied in determining staffing contributions for rosters, with the larger libraries contributing around twenty two hours per week and the smaller partners around six hours. Smaller library services in particular, would have found it difficult, if not prohibitively expensive, to have offered virtual reference as a service option on an independent basis. Conversely the service model has provided an ideal opportunity for individual states to work together in the area of reference delivery – a relevant example being collaborative efforts to define a common set of recommended Australian internet links.

The thrust of Coffman and Arret's article is that a significant number of services in the United States are receiving insufficient return (as defined by a critical mass of users) on their considerable infrastructural investment in virtual reference. In this context the authors single out a handful of exceptional services - among them AskNow! - which 'get thousands of questions per month' (Coffman & Arret, 2004a) and make the point that these services operate within consortia. The business case here is obviously, that on a national basis, the enquiry volume is sufficient to justify associated costs and staffing imposts. An ancillary benefit of the AskNow! investment is that a national model has been developed for

the delivery of virtual reference which can be customised and applied by other services. A proof of concept in this respect was the State Library of Queensland's Ask Careers 2005 virtual reference pilot which was modelled on AskNow! operating principles.

One point sometimes made about the numerous cooperative models which now exist in a number of countries – whether they take advantage of different time zones, common educational, legal, medical or other subject expertise, or multitype library (special, academic, public) resources and specialisations – is that there needs to be a 'good institutional fit' (Patrick & Matthews, 2002).

Linden Fairbairn in her presentation to the 2005 Information Online Conference refers to the problems faced by the University of Sydney in joining a collaborative because of their 'already diverse and complex environment' which is based on a subject specialist approach (Fairbairn, 2005). It has been to AskNow's advantage that participating libraries share a reasonable understanding of one another's mainstream services, available resources and terms of service. This has undoubtedly made it easier for the collaborative to achieve consensus on policy, guidelines and service standards.

AskNow! has also benefited from having access to an extended pool of experience and from the opportunity to address problems collectively. Partner libraries for example have tested the functionality of software products, contributed to enhancement suggestions, co-authored training

packages and shared web design projects. Cooperation has allowed for maximum flexibility in relation to spread of service hours across four time zones (six during daylight saving months) and to the service's ability to meet operating commitments. In a broader sense it could be argued that the public ultimately benefits from the increased awareness operators have acquired about the specialist resources and services offered by their partner states and from their exposure to a wider audience. Also informing professional best practice in the longer term is the fact that a forum now exists, through the mechanism of the AskNow! discussion list, for the exchange of information about Australian reference services at the operational level.

The cooperative framework

Critical to the success of the AskNow! cooperative is its governance model. Without the formal structure of the Council of Australian State Libraries (CASL) it is unlikely the service would have commenced and been sustained. As illustrated in Figure 1 (Appendix A), the service is managed by CASL through the Reference Issues Working Group (RIWG), which provides guidance and direction to the group. Operation of the service – along with its reporting responsibility to RIWG - are co-ordinated from the National Library of Australia by the AskNow! Service Manager. The National Library of Australia's legal responsibility for the service is underwritten by the AskNow! Australia Deed signed by partner libraries. A two year Business Plan, which is informed by the biennial evaluation of the service, sets out the service approach, its deliverables,

objectives and costs and includes a schedule of activities for the period. Members of RIWG meet face to face annually and by teleconference through the year, focusing on any issues raised in the Service Manager's quarterly reports to each CASL meeting. Operational issues are decided at teleconferences and on the email list serve and documented online through a web based administration page. Partner libraries then disseminate the information or instructions to the participating public libraries in their states.

Because of the significant geographical distances between libraries, operator training is dispersed and is the responsibility of partner libraries, rather than being centralised. State libraries train their own operators as well as those in participating public libraries in their home states. However service-wide quality control training, scheduled for later this year, will make use of integrated web and phone communication software to simultaneously include all operators across the country.

Maintaining success

In addition to continuous quality assessment through transcript analysis, an evaluation of the service, based on patron exit surveys, is conducted annually. This is supplemented every two years by a more comprehensive evaluation process, undertaken from a CASL, individual library, operator and client perspective using transcript analysis, questionnaires and focus groups.

As is evident from the most recent Evaluation Report, service quality is

affected by a number of issues, not least among them the operation of the software used to deliver the service:

What is critical to a good chat session? Lots of things! The technology needs to work, for one. It's a real challenge when the connection drops out, or the screen continuously refreshes.
(Focus Group discussion, *AskNow! Evaluation, 2006*)

While the functionality of dedicated software has improved markedly over the past four years, virtual reference services are constrained by the limited availability of suitable software products on the open market. A related issue is that existing software companies are mainly based overseas, a fact which complicates the trouble shooting of technical support issues. The variety of local library platforms, hardware configurations, network infrastructure, operating systems and varying levels of IT support adds another layer of complexity for libraries.

The emphasis in AskNow! is on supporting research and applying information literacy principles, rather than simply answering questions. In this context a knowledge base would have an instructional role in informing our users about quality websites and effective search techniques. In the near future we will trial posting a selection of edited session transcripts to the QuestionPoint knowledge base where enquirers can scan for relevant information before or after asking a question of an AskNow! operator. Many libraries, including the National Library of Australia, have recently employed publishing mechanisms inbuilt in existing software, such as email, to

efficiently produce very popular, up to date FAQ web pages. One can predict that our users will expect and demand more of these packaged resources (possibly with social networking software, in the Wikipedia model) from question/answer services such as AskNow!

One of the key lessons we have learnt in the four years of AskNow's operation is the importance of how we communicate with our users about our services and about their value and effectiveness in meeting a range of information needs:

Great service and idea! Needs to be promoted more.
(*AskNow! Evaluation, 2006*)

Following the original promotion efforts in 2003, usage peaked quickly and most recently has plateaued, partly due to a deliberate strategy to subdue our marketing efforts while we became confident of our capacity to handle more questions. We are now planning a more focused campaign for adult patrons in selected regional areas in each Australian state and territory.

School students

The popularity of virtual reference services with young people has meant that libraries around the world are experiencing unprecedented success in reaching an important target group, so much so that some are looking at collaborative solutions to meet the increased demand. An example is AskColorado, a highly successful collaborative of sixty public, academic, school and special libraries which answers around 5,000 questions a month on a 24/7 basis. Last year AskColorado offered Tutor.com's Live

Homework Help, a commercial online tutoring service for students, as an adjunct to its standard chat reference service (S. Morris, personal communication, April 26, 2006). Closer to home is New Zealand's AnyQuestions, a virtual reference service hosted by the National Library of New Zealand in partnership with the education sector, which specifically targets school children. The experience of services such as AnyQuestions and AskColorado is of particular interest to AskNow! as the consortium prepares a proposal for an online chat homework service to fill the need for more targeted help for school students.

Any analysis of the challenges inherent in a chat based service such as AskNow! is likely to identify the inappropriate usage of the service by school students as a persistent concern. The dimensions of the issue are complex in that the low access barriers deliberately established for the service - and particularly the absence of any authentication requirement - are also an inducement to take advantage of the apparent anonymity factor. While occasional rudeness on the part of students is at the extreme end of the problem, overuse by school groups sending similar questions, a lack of experience in expressing information needs and unrealistic expectations about the availability of online homework help solutions are more common issues. A representative view registered in the 2006 evaluation by an AskNow! operator is that:

time is perhaps the most critical thing; we need to have time to spend with the patrons, particularly the kids, whose information literacy needs to be invested in.

Another relevant issue raised by an operator was that:

One of the most difficult aspects of working on AskNow! is finding age-appropriate material...if you're working with school kids, very few of the sites are comprehensible to them.

The topics of inappropriate behaviour and high levels of student use are widely debated by chat operators around the world and are the subject of numerous workshops, conference presentations and listserv messages. There appears to be a general consensus in these discussions that, although use by young people (the library users of the future) is welcomed and in many instances encouraged, service expectations need to be communicated at login stage and in promotional materials. AnyQuestions is one service where this strategy has clearly been applied. The upfront message is that the service is designed to assist with research rather than to provide answers. The AskNow! service has addressed the problem, albeit with limited success, by creating a separate entry point for students which takes them to advice about appropriate usage, search tips and links to homework help sites.

The AskNow! patron

In terms of how issues affecting optimal service delivery in virtual reference are identified and addressed, the evaluation process in general - and transcript analysis in particular - have offered an excellent opportunity to better understand the information seeking behaviours of our clients. Transcripts, for example, highlight the widely recognised problem of the disappearing

patron who fails to communicate after lodging a question. While it is possible that a small percentage of users confuse the functionality of chat with that of an email initiated service, we now know that many of our patrons are multitasking and may be simultaneously involved with alternative online activities (AskNow! Evaluation, 2006). We have learnt from the 2006 evaluation, contrary to what might have been expected - given longstanding professional concerns about silences at the user end before or following contact - that clients are generally not inconvenienced by waiting times and report that on average they receive relevant information within five to fifteen minutes.

In the context of AskNow's 2006 evaluation the profile which emerges of the AskNow! client is one of an internet savvy user who regards the web as a primary research facility. The evidence of exit survey responses is that around 50% of clients use the service in relation to curriculum (school or tertiary) based activity while the needs of other clients are related to professional/work based, personal and independent scholarly research interests. Although the majority of patrons (around three-quarters) are library users and have discovered the service via a library connection, they tend to use public libraries for recreational rather than research purposes (AskNow! Evaluation, 2006). While younger students typically approach AskNow! for initial help with an enquiry, more mature users report that they use the service when independent searching has been unsatisfactory. The experience of one focus group respondent was that:

If you're not searching for your answer in the right way or looking in the wrong place you just end up wasting time. AskNow! steers you in the right direction quickly and easily. (AskNow! Evaluation, 2006)

A further issue is the assumption by some patrons that their questions are being addressed to a local public or state library, a not unreasonable supposition given the lack of any precedent for a national service and the placement of the AskNow! link next to alternative reference contact details on the web pages of participating libraries.

I submitted a question from the State Library web site and received an answer from someone in NZ. Due to the nature of the question, it took me by surprise that I had entered a much larger network. (AskNow! Evaluation, 2006)

Exit survey comments such as this one are an indication that information about the scope and national character of the service needs to be positioned more prominently on the AskNow! website. There is also a role for operators in reassuring these patrons of our capacity to provide assistance (no matter what our location) through our access to shared resources such as Libraries Australia.

Future Directions

The evidence from dedicated discussion lists, blogs and conference agendas is that virtual reference is an evolving and dynamic service option which is responding to technological opportunities and best practice principles. Among broad ranging discussion about service models,

evaluation methodology, training programs, student behaviour, online reference sources, use of Wikipedia, software functionality, co-browsing and related matters, a few dominant trends are evident.

Of these, instant messaging (IM) emerges as one development with some profile. There appear to be two incentives for establishing IM services – the evidence of an accelerated takeup of this technology by younger people (Pew Internet and American Life Project, 2005) and, given that the software is free, its undeniable cost advantage. One view is that integration with standard virtual reference is critical to the latter's continued relevance (Penka, 2005, November 15). At the time of writing there were over eighty United States library services - the majority of them university libraries – offering instant messaging reference ("Library success: A best practices wiki," 2006) and a number of these have added IM to an established virtual reference service. A further variation on the conventional model of virtual reference is SMS, a service pioneered in Western Australia by the Curtin University of Technology's 'SMS a Query'.

While it is difficult to predict the future direction of virtual reference services with any degree of certainty, it does seem likely that collaboration and cooperation will be influential themes. One trend now well established is the use of commercial online reference providers to offer an after hours service. AskColorado, for example, uses Tutor.com's Librarians by Request to extend the service coverage to nights and weekends (around 25% of the total

service usage) (S. Morris, personal communication, April 26, 2006). Of related interest is the potential, recognised in the international arena, for library services to collaborate with government agencies in the health, career counselling and other sectors.(Kortz, 2006, May 12).

It is an option for AskNow! to actively seek out and pursue mutually productive collaborations with traditional partners, some possibilities being additional Australian public libraries, the education sector, constituent groups such as the 24/7 Reference – QuestionPoint global network or even university libraries. As an indication of the potential here, seven, out of the eleven university libraries in New South Wales provide a virtual reference service for their students (Council of Australian University Librarians (CAUL), 2006). Initiatives such as these are likely to increase AskNow's visibility and would provide additional opportunities for identifying new staffing and funding sources. The service would need, in the event of further expansion, to develop new strategies for maintaining and advancing its role as a leader in virtual reference provision in this country. The proposal for a separate service for school students is an immediate catalyst for such change.

Conclusion

The longer term challenge for AskNow! is to ensure the service continues to align itself with the interests of its virtual clients. We need not only to remain relevant, but also to tell potential users about our service. Our success to date has shown that people with information needs are willing to embrace chat technology as a reference solution,

however we are also aware that to remain viable as a service, our reputation needs to be associated with the quality, currency and accuracy of the answers we provide. Our future emphasis will therefore be on both the quality aspects of service delivery and on promoting AskNow! to a wider constituency.

In the words of Ann Lipow, who first inspired Australian librarians to embrace virtual reference back in 1999:

We have to become more convenient...rather than thinking of

our users as remote, we should instead recognise that it is we who are remote from our users. We need to change how we do business in such a way as to get us back together (Lipow, 1999).

The collaborative business model which, for the past four years, has successfully underpinned our venture into new reference territory has empowered librarians in three countries to make precisely this sort of connection with our users.

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