
Evaluating from Arm's Length: Assessing Services Provided by a Library Consortium

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Abstract

Assessing services provided by a consortium presents a slightly different set of challenges than assessing services provided by a library. However, there is very little literature on the subject, even though member libraries are increasingly eager to know the quality and value of the services they receive from consortia. This paper seeks to bridge that gap by discussing the challenges faced and strategies used by Scholars Portal, the service provider for an academic library consortium, in assessing its services.

The distance between consortium and end users, a relationship mediated to varying degrees by the user's local library, presents a difficult challenge and must be acknowledged in assessment planning. While every service provided by Scholars Portal has a different user base and different outcomes, making consistency of measurement across services difficult, consistency of assessment practices within each service is vital to tracking our performance and communicating our value to members. More streamlined and consistent evaluation tools for Scholars Portal services are being developed, helping us to more effectively track our performance and communicate our value to members.

Introduction

As budgets shrink or remain static while demand for resources grows, assessment is an increasingly important part of day-to-day operations for academic libraries. Given the current climate, it would appear shortsighted for any library to offer a new service without thinking about how its outcomes could be properly assessed. Budgetary restrictions also mean that there is a greater value placed on developing consortial solutions where multiple partners can defray the costs affiliated with providing a new service. And yet, the assessment of consortia and consortially-provided services is lagging behind, with very little literature dedicated to this area.

The Ontario Council of University Libraries (OCUL) is a consortium of Ontario's 21 university libraries. OCUL leverages collective resources to negotiate, purchase, and steward electronic collections. OCUL also provides digital infrastructure through Scholars Portal, the consortium's service arm. Introduced in 2002 to provide a platform to host OCUL's electronic journals content, Scholars Portal quickly expanded to provide support for SFX, an OpenURL link resolver, and RACER, an automated interlibrary loan system. Scholars Portal has since developed a wide range of content repositories and member services supporting collections, digital preservation, research, and data.

The same forces that have driven the growth of the assessment culture in libraries and the practice of evidence-based librarianship are also present in the consortial environment. As a result, it is necessary for OCUL to demonstrate its value to member institutions and provide librarians at these institutions with the tools and information they need to justify consortial membership to their own stakeholders. Meanwhile, Scholars Portal, as OCUL's service provider, needs to ensure that the services we provide meet the needs of both member libraries and end users.

The member services team at Scholars Portal has begun to revisit the assessment practices of our services. This paper highlights three case studies of consortial services with different user bases and different assessment needs. Two are services for end users: (1) Ask a Librarian, a virtual reference service, and (2) the Accessible Content e-Portal (ACE), an accessible texts repository. One service is directed at libraries, our management of SFX, an OpenURL link resolver, and its associated knowledgebase. In each case, current assessment practices were documented, their strengths and weaknesses were evaluated, and new assessment measures recommended.

Literature Review

The majority of the existing literature about assessing consortia focuses around the content that the consortium provides. This type of assessment has already been performed at OCUL.¹ Newer and more innovative approaches have been taken by organizations such as the California Digital Library, which has been at the forefront of developing objective metrics for evaluating big deal journal packages, informing practices across similar organizations.²

Beyond this focus on content, Chadwell³ has argued persuasively that consortia owe it to their members to articulate a value proposition and demonstrate that they actually provide that value. In a Canadian case that would be familiar to OCUL members, the Canadian Research Knowledge Network (CRKN) had conducted an academic-style external review to assess its organizational and negotiation effectiveness.⁴ While this review did give CRKN members some ability to benchmark CRKN's effectiveness compared to other consortia, it also highlighted the difficulty of such cross-consortial comparisons. Library consortia are incredibly varied in terms of mandate, offerings, funding, and organizational structures. This diversity of organizational membership may be one of the reasons that assessment literature about consortia is so sparse. There may in fact be a great deal of evaluation of library consortia, but it is simply not distributed beyond the immediate consortial membership.

Assessing Library Accessibility Services

Library accessibility is a very new field for academic libraries with a modest body of publications dedicated specifically to this topic. Literature on assessment of library accessibility services is largely borrowed from more general subjects, such as evaluating public and technical services. In *Research & Practice in Assessment*,⁵ the need to move beyond usage data is emphasized, stressing the value of linking student usage of accessibility services to the user's academic performance. This measure is extremely difficult to evaluate and would involve a variety of stakeholders and some potentially private data.

Besara and Kinsley⁶ also touch on assessment of student success and stress the value of working with campus-wide initiatives and stakeholders to develop programs that are evidence-based. In the case of

consortial initiatives, this is extremely difficult to do because of the disconnect between the staff who support these services and their end users. For library accessibility initiatives, consortia can help with policy development and implementations of shared resources and guides; however, they rely heavily on the actual university staff to conduct their own assessment and to provide feedback with regard to future direction. What consortia are very good at doing is connecting individuals from different institutions who share similar institutional goals to establish a community of practice that can collectively develop best practices and support future initiatives in these areas.

Literature related to technical services can also be applied to the assessment of library accessibility services. Mugridge⁷ studied sixty libraries and their assessment practices and concluded that statistics, usage data, input from nontechnical staff, surveys, anonymous suggestion box comments and input from focus groups all provided useful assessment strategies. Thinking about who will receive these assessment reports, streamlining assessment processes and working collaboratively helped in the development of better departmental strategies and information sharing.

In the case of initiatives such as ACE, all of the above methods of assessment have been successfully utilized to produce dynamic annual reports that are then circulated across community membership as well as administration. Given the existing issues with regard to medical privacy when serving users with disabilities, broader strategies can be employed by soliciting input from an advisory group. Ensuring that all members are happy to talk about their experiences with others in a group is critical in ensuring a fair and equitable approach.

Assessing Virtual Reference Services

Evaluation is critical for virtual reference services, as they require complex planning and are resource-intensive.⁸ Regular assessment is essential to demonstrate to library administration that virtual reference services are meeting user needs, providing value, and using resources efficiently.⁹

Virtual reference services are most commonly evaluated from two perspectives: the service perspective and the user perspective. The service perspective is concerned with the efficiency, quality, and cost-effectiveness of a particular service. They

might examine the volume of questions handled over a unit of time, the types of questions submitted, the completeness and correctness of the responses, and librarians' adherence to behavioral standards.¹⁰ Data is collected from chat logs, statistics, and transcripts captured by the software.¹¹

The user perspective is concerned with the effectiveness of the service, and takes into account the user's satisfaction with the information provided and the assistance received.¹² Evaluations from this perspective study users' awareness of the chat service, preference for chat compared to other library services, and perceptions and feedback about the service, including usability, satisfaction, and willingness to return.¹³ Data is commonly collected through exit surveys, but studies can also incorporate observation, interviews, focus groups, and usability analyses.¹⁴

Inspired by business research demonstrating a direct relationship between employee attitudes and customer satisfaction, library services are increasingly being evaluated from the perspective of the librarian.¹⁵ Recently, studies in the virtual reference literature have begun to examine library staff's attitudes toward and experiences of virtual reference services.¹⁶

Evaluating a consortial chat service adds an extra layer of complexity, as it necessitates assessing the service from the perspective of the participating libraries.¹⁷ To understand how the service is used across the partnership, consortia analyze the proportion of questions submitted by users at each library or the number of questions handled by each institution's operators,¹⁸ or how well participating libraries meet virtual reference quality standards developed for consortia, such as those outlined by Kasowitz and colleagues.¹⁹

Assessing Link Resolvers

Assessment literature involving link resolvers has primarily focused on using link resolvers to assess collection usage or identify causes for broken links and other metadata-related problems. However, several pioneering studies have evaluated the link resolver itself as a tool. Staff feedback is an important metric for assessing link resolver effectiveness. Livingston, Sanford, and Bretthauer²⁰ and Breeding²¹ used surveys to ask library staff how they felt about the link resolver they used in order to compare products currently on the market.

While considering the staff perspective is vital, usability testing and usage log analysis help develop a full picture of how users experience the front-end interface. Staff feedback was used in conjunction with usability testing by Johnson, Leonard, and Wiswell²² as they prepared to switch link resolvers. While staff responded to a survey about the link resolver back-end, users were given tasks to accomplish using the link resolver menu. Meanwhile, Highsmith and Ponsford²³ analyzed usage logs to determine how their users interacted with the link resolver menu. Based on these findings, the link resolver menu was changed to more clearly point to the full-text content. A follow-up usability test revealed that these changes improved user experience and suggested more fine-tuned improvements.²⁴ Automated statistics were also used by Ashmore, Allee, and Wood²⁵ when they analyzed interlibrary loan requests that were cancelled because the material was held locally, implying that the users were unable to determine from the link resolver menu that the library already had the material. This allowed the authors to identify areas of confusion within the link resolver menu design.

While all of these studies were performed on institutional instances of link resolvers, some of these techniques, such as the innovative use of log data, could easily be applied at the consortial level. With such a small body of literature, best practices for link resolver assessment have yet to be determined, but it is instructive that most institutions have used more than one method of assessment.

Case Studies

Hamstrung by budget cuts, OCUL member libraries increasingly expect both OCUL and Scholars Portal to demonstrate the value that they offer, in order to justify the expense of consortial membership. In addition, for specific Scholars Portal services, there has been more demand for granular and sophisticated usage statistics from librarians who want to make informed decisions. In some cases, members are opting out from services in which they previously participated. The impetus for these case studies was to ensure our assessment practices allow us to demonstrate our value to libraries, enable librarians to assess how well our services meet their users' needs, and identify areas of member dissatisfaction.

The Accessible Content e-Portal

The Accessible Content e-Portal (ACE) was funded by a one-time provincial grant and began as a pilot project in 2013, which upon successful completion became an ongoing Scholars Portal service in 2014. When the service was in its infancy, assessment was conducted on an informal basis, until 2015 when the decision to create an annual assessment plan as part of formalizing the structure of the service was made.

ACE continues to grow, aided by the Integrated Accessibility Standards, which fall under the Accessibility for Ontarians with Disabilities Act (AODA). Its mandate has developed accordingly; beyond offering a text repository, ACE has fostered a community of practice, and expanded its offerings beyond OCUL institutions in 2015 to include Ontario colleges (OCLS). This new partnership has also highlighted a strong need for reviewing existing assessment strategies and expanding that repertoire of measures to accommodate new partnership interests.

In the fall of 2015, work began in developing the first draft of the ACE annual assessment plan by documenting existing measures, interviewing stakeholders, and conducting a literature review. The ACE service team worked with a University of Toronto iSchool practicum student to help identify what was currently being tracked and what was possible to be tracked within the workflow and technological framework of the service.

Key areas of investigation focused on the following questions:

- How well are we serving our end users?
- How well are we serving library staff?
- Quality and timeliness?
- Are we a cost-effective way to meet the AODA goals?
- Are we meeting our own goals of reducing/preventing duplication of labour?

One key challenge to the assessment of this service is the anonymity of its users, due to the service's aim of protecting their privacy. It is difficult to speak to users when we are not supposed to know who they are. There is a feedback survey that is used occasionally, but we have very little idea of the nonresponse rate. Sometimes the feedback is passed along to us from staff, but this does not provide a complete picture. Additionally, the experience is very different for individuals depending on their disability

and what assistive technology they are using to experience the service.

The ACE service does have a robust user advisory group comprised of library users with a variety of abilities, ranging from undergraduate and graduate students to faculty, which provides input with regard to testing new features and troubleshooting. However, it is a smaller group of users who do not represent the vast breadth of disabilities and learning techniques of the day-to-day service users.

By November 2015, the sample Annual Assessment Plan was drafted for review by the ACE working group, comprised of accessibility staff from across OCUL institutions. This document contained a vital section with an assessment template. Reports were generated for the first time in spring 2016. The actual creation of these reports brought forth new issues about who was interested in which measures, as well as technical problems, such as some forms of usage not being properly tracked. The assessment template developed as a part of this report will be adapted to other OCUL services, in order to improve transparency and increase consistency with regard to comparing how various services are performing and the measures that are available to member institutions to use in their own annual reports.

Ask a Librarian/Clavardez avec nos Bibliothécaires

The Ask a Librarian virtual reference service launched in 2011 and continues to grow. Originally, Ask a Librarian provided service in English only. In 2014, a French version of the chat service, called *Clavardez avec nos Bibliothécaires* ("Chat with our Librarians"), launched as a two-year pilot project. Made possible by funding from the Canada-Ontario Agreement on French Language Service, *Clavardez* enabled university libraries with bilingual service mandates to join the chat service.

Coordinators of both services have regularly collected usage statistics, user demographics, and patron satisfaction ratings at the consortial level from pre-chat and exit surveys and chat session records. These statistics inform management decisions, such as staffing levels, operator training, and potential improvements. The service coordinators also regularly collect usage statistics for each participating library. In addition to helping service coordinators understand local usage patterns, these statistics are used by OCUL to

calculate each library's participation fees, as Ask/*Clavardez* is not covered by OCUL membership fees. Furthermore, the coordinators track the number of questions answered by operators and the exit survey responses of users at each participating library, as these statistics are often reported to university administration to help demonstrate the value offered by the consortium.

Several evaluation projects have also focused on aspects of the chat services. Soon after Ask a Librarian launched, Maidenberg, et al.²⁶ performed a transcript analysis to understand how patrons were using the service and Logan, et al.²⁷ performed content analysis on questions posed through Ask a Librarian and her library's FAQ service to compare search behaviors across virtual reference mediums. Another project focused on operators' adherence to RUSA behavioral guidelines and the effect operator behaviors have on patron satisfaction.²⁸ Finally, assessment of the French pilot involved analyzing French chat transcripts and interviewing bilingual operators.²⁹

Most of Ask and *Clavardez*'s regular evaluation efforts have been performed from consortial, library, and user perspectives, with a focus on transactional statistics and user feedback. However, examining usage and user satisfaction is only part of measuring service effectiveness.³⁰ To fully understand how a chat service is performing, it is necessary to examine the content of transactions and the quality of answers, in order to identify user needs and measure how well they are being met. This could be achieved by periodic transcript analysis. Furthermore, to ensure resources are being utilized effectively, the cost-effectiveness and return-on-investment of Ask and *Clavardez* should be explored.

To date, user-centered evaluations of Ask/*Clavardez* have focused narrowly on satisfaction. To achieve a more holistic understanding of how the services are perceived, it would be advisable to examine users' awareness of the service, preferences for various information sources, reasons for use or nonuse of chat, and perceptions of the services' usability. This could be achieved through a range of qualitative research methods, such as interviews, focus groups, or observation.

Finally, aside from Laflamme's³¹ interviews of *Clavardez*'s francophone operators, the librarian perspective has been largely neglected. Operators'

perceptions and experiences should be incorporated into standard assessment practices. This is currently of particular importance, as the chat services recently migrated to a new platform, and service coordinators would like to understand how this has affected staff morale.

SFX

Scholars Portal has managed a consortial instance of SFX, the OpenURL link resolver provided by Ex Libris, since 2002. Link resolvers facilitate the connection between a citation or a metadata record and the full-text resource by drawing on a knowledgebase of electronic holdings information. Initially, this SFX instance was intended to support the use of the locally hosted e-journals platform at Scholars Portal, and staff continue to maintain a target within the knowledgebase using the holdings on our journals platform.

As a "core" service of Scholars Portal, SFX is funded directly from OCUL membership fees. Despite this, a number of libraries have stopped using the service in recent years. Nearly a third of OCUL institutions have dropped the service entirely, while others have reduced their usage as they supplement SFX with another link resolver or knowledgebase. This has raised questions at Scholars Portal, such as:

- Is it still true that consortially maintaining a link resolver and knowledgebase saves staff time at member institutions?
- Is SFX still effective as a product?
- If Scholars Portal moves to a different product, such as a next-generation library system, how can we ensure that the product we select and the support we provide meet member needs?

In spring 2016, the OCUL-Scholars Portal committee, Scholars Portal's governing committee, distributed a survey to OCUL members asking about their use (or lack thereof) of the SFX link resolver and knowledgebase, as well as other locally managed products. Findings were mixed. Schools without the in-house expertise or capacity to maintain a knowledgebase found a great deal of value in having this service consortially. On the other hand, libraries that use a discovery layer found themselves dealing with two knowledgebases. This redundancy led some to drop SFX. Libraries that use another link resolver in addition to SFX were able to pinpoint some pros and cons to SFX and their other tool, but no clear winner emerged.

This survey revealed some interesting considerations for future attempts at evaluating SFX. In some cases, it was difficult for the school's representative on the OCUL-SP committee to determine which individual at the institution should be answering this survey—a lack of communication channels which might help explain why Scholars Portal has been receiving so little feedback with regards to SFX. Additionally, the survey highlighted a stark distinction between large and small schools. At large institutions, there was enough local expertise that staff had informed opinions about what features were important in link resolvers and enough local capacity to maintain a separate knowledgebase. At small schools, staff did not have enough capacity and found consortial management of a knowledgebase very valuable, but often did not know much about different link resolver products and the features they offered. These twin dilemmas—that the schools who most relied on Scholars Portal's management of SFX had the fewest opinions on link resolvers as a whole, and the lack of communication between the decision makers at Scholars Portal and the institutional staff who work with link resolvers regularly—must be taken into account in future assessment methods and tasks.

Thus, the OCUL-SP survey did not provide clear answers to the questions that framed this investigation. However, responses to the survey did illuminate divisions within OCUL membership, identify areas for further investigation, and highlight the need to check in regularly to see how well SFX meets the needs of member libraries. In consultation with OCUL-SP, Scholars Portal staff hope to develop an assessment plan to track member satisfaction with SFX.

Discussion

Scholars Portal has never had coordinated assessment plans covering its suite of services. Typically, assessment has been performed on an ad hoc basis, and workflows and technologies have often dictated which data was collected. Consequently, assessment practices have sometimes been based on the information that is the most expedient or convenient to collect, or specific measures that specialty focus groups had requested, rather than a more comprehensive plan that would shed the most light on Scholars Portal's value or the institutional goals or priorities of OCUL members. Evaluations have also skewed heavily towards statistics, at the expense of rich qualitative

information. Scholars Portal is now trying to bridge this gap by formalizing assessment practices across its services, beginning with ACE, Ask a Librarian, and SFX. These three services each have assessment plans in different stages of development.

The Accessible Content e-Portal assessment plan was developed in consultation with the service's working group. The development involved reviewing ongoing practices and identifying new areas where value could be found. A template was created, including key components: measuring institutional usage (usage statistics, collection size, number of users), measuring user satisfaction (quantitative and qualitative user feedback), and service team efficiency (turnaround time, troubleshooting time, technical issues resolved). The hardest aspect of conducting assessment for ACE was the missing feedback from participating institutions. Since every member institution tracks statistics that are of particular value to them, it was difficult to ensure consistency in the kind of information that was available on the institutional side. The first assessment reports circulated in spring 2016.

The assessment plan for Ask a Librarian and *Clavardez avec nos Bibliothécaires* is currently being drafted. It will incorporate best practices from the virtual reference assessment literature, such as performing evaluations from a range of perspectives over the long-term, and going beyond the numbers by gathering qualitative information such as the motivations, opinions, and preferences of users.³² These will help address the weaknesses in the chat services' current assessment practices, such as the lack of the librarian perspective, and an overreliance on usage statistics and exit survey responses.

Based on work performed by the OCUL-Scholars Portal committee, Scholars Portal staff have identified several areas of interest and potential challenges in terms of future evaluations of SFX. The need to balance the competing priorities of 21 different institutions of varying sizes and areas of focus will be a key consideration as staff begin to craft an assessment plan for SFX. This plan will build on the current practice of collecting usage statistics and complement it with regular feedback from staff at member libraries.

The case studies underscore the need to maintain communication, both with libraries and end users, especially for services in which there is little direct

interaction with the user base. Scholars Portal staff should be in continual contact with OCUL member libraries so that assessment practices reflect the priorities and goals of members. In order to collect qualitative information that can indicate the need for service improvements, it is also critical that Scholars Portal has open lines of communications with service users. This could be achieved by organizing focus groups or interviews, or by consulting with an advisory group, which ACE has done successfully. Staff at member libraries should also be encouraged to report qualitative user feedback they receive back to Scholars Portal.

Assessment planning should leverage the expertise of specialists. Ask a Librarian has had success partnering with assessment librarians at participating libraries to evaluate the satisfaction with Ask at that particular institution. This kind of collaboration helps open communication and reduces the impact on Scholars Portal staff capacity. The Ask model could be expanded, with Scholars Portal staff working with assessment librarians at multiple member institutions to evaluate the service as a whole, and could potentially be used to evaluate other Scholars Portal services, particularly SFX. Working across multiple institutions will also help balance the differing priorities of OCUL member libraries.

Finally, assessment plans should not be static. Once an assessment plan is put into place, it must adapt to the changing needs and priorities of member institutions. The assessment plans Scholars Portal staff create should be reviewed regularly, both internally and with the groups that help steer the directions of these services, such as the working groups for ACE and Ask a Librarian and the OCUL-Scholars Portal committee for SFX. Changes to the service, or changes in what members want to know about service effectiveness, would require a modification of the assessment plan.

Conclusion

Assessing the services provided by a library consortium is just as necessary as assessing services provided by individual institutions. However, the additional factors of an extra perspective (the library as client), the distance from end-users, and differences between the needs and priorities of different libraries can all contribute to making such assessment difficult. The solutions to these

difficulties and ultimately the best practices for assessment can vary greatly between services. However, developing and maintaining proper assessment plans for each service, taking into account that service's stakeholders and specific value proposition, allows a certain level of consistency of assessment, ensuring that the consortium continues to meet the needs of its members and demonstrates the value that it provides to them.

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Endnotes

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