



**State Library**  
of Victoria  
slv21

# PROJECT BRIEF – Stage 1

## Re-imagining Library Services - Virtual Reference

Version No: 2.0

**Project Manager** Leneve Jamieson    Manager Access & Information

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Name	Title	Date	Signature
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**Project Sponsor:** Anne-Marie Schwirtlich    State Librarian / CEO

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Name	Title	Date	Signature
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**Recommended**            Yes     No

**Investigation Required:**    Yes     No

**Executive:**

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Name	Title	Date	Signature
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**Approved:**            Yes     No

## DOCUMENT ACCEPTANCE and RELEASE NOTICE

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PREPARED: \_\_\_\_\_ DATE: \_\_\_ / \_\_\_ / \_\_\_  
(..... Project Manager)

ACCEPTED: \_\_\_\_\_ DATE: \_\_\_ / \_\_\_ / \_\_\_  
(.....)

### STATUS

Version	Date	Author	Reason	Sections
0.1	29/09/08	L. Jamieson / W. Quihampton	First draft	All
0.2	16/11/08	L. Jamieson / W. Quihampton	Second draft	All
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1.0	04/02/09	L. Jamieson / W. Quihampton	Revision post-discussion S Bruhn	All
2.0	17/2/09	L. Jamieson	Revision post-feedback from National Group	All

### AMENDMENTS

Section Title	Section Number	Amendment Summary
Version 2.0	1.1, 2 and 6	

### DISTRIBUTION:

Copy No	Version	Issue Date	Issued To
1.0	1.0	4/2/09	National Project Group
	2.0	23/2/09	National Project Group

## Project Title:

### 1. Context

#### 1.1 Drivers (Opportunities, Issues)

NSLA Libraries are currently delivering the AskNow Reference Service through a collaborative business model utilising QuestionPoint software. Both the software and the model constituted a new and innovative way of delivering reference services when the service began in 2002. However the business model has remained relatively unchanged in an ever-changing and ever more complex online environment.

The rapid evolution of convergent mobile technology and the consequent rise of 'prodsumer' culture along with the rapid development of the Web 2.0 environment have brought with them user expectations which provide both challenges and opportunities for reference services. Web 2.0 is ultimately a collaborative environment built on an architecture of participation and peer-to-peer exchange, where a culture of experimentation and the concept 'forever beta' dominates. Web 2.0 has also seen the emergence of answer services such as WikiAnswers, ChaCha.com and Yahoo! Answers, which operate in the web space with great visibility.

The existing business model lacks the flexibility to meet and continually adapt to the constantly changing needs of users in this environment. Virtual reference needs to adapt to the way people live their lives now. The virtual reference model and the current collaborative model need to be rethought within this context.

NSLA Libraries want to develop a whole of reference service model that integrates virtual reference as a core function, recognises the impact of changes in technology and demography on reference services in the 21<sup>st</sup> century, and acknowledges the resourcing commitment required. The Re-imagining Library Services program provides the opportunity to place our reference services firmly on a path of evolution and ongoing relevance to our users.

To do this, NSLA Libraries recognise the need to move the immediate focus away from the existing chat platform and to address fundamental questions in a new way to lead to the delivery of a 21<sup>st</sup> Century business model for their reference services:

- What is our understanding of the expectations and behaviour of users in relation to having their information needs satisfied in the current digital environment? How well are we currently satisfying those needs?
- What is the nature and potential of reference and information services in the current, and medium-term future environment?
- What are the actual reference services, both mediated and unmediated, in which NSLA libraries need to be involved, in an environment which is increasingly dominated by "the digital"?
- How does the professional expertise of librarians in NSLA libraries fit into this environment? What are the mediated and unmediated online services that might be provided, across what platforms and what service models?

#### 1.2 Strategic Fit

This project will align with the NSLA vision through the following strategies:

##### One Library

- A consistent experience across our libraries
- Ability to create, transform, use and share content

##### Transforming Our Culture

- The development of a new organisational design
- Capability to deliver the Re-imagining Library Services vision

- A culture of innovation and exploration

#### Accessible Content

- Improved access to our content

## 2. Products/Services to be produced

The ultimate aim of the project is to establish an agreed 21<sup>st</sup> century reference strategy for NSLA Libraries, an agreed business model for delivering on this strategy into the future and a transition process to move from the current model to the new one. Owing to the requirement for significant research to locate best practice options for 21<sup>st</sup> century reference services in an environment that is continually shifting, this brief encompasses only those components relating to Stage 1.

Stage 1 of the project, until October 2009, will involve:

- research and investigation, including a literature search.
- development and commitment to a 21<sup>st</sup> century reference strategy
- development of, and planning for transition to, an agreed business model

This stage will encompass:

- Ensuring there is a shared understanding across and within NSLA libraries of the Web 2.0 environment and user expectations of libraries and librarians within this context
- Assessing the multiplicity of ways in which relevant and responsive reference services might be offered in this context
- Developing options for, and selecting, a new business model for service delivery that has commitment from all NSLA libraries
- Planning for the transition from the current collaborative AskNow chat service to a new model

Stage 2 of the Project will move to the implementation of the agreed business model.

AskNow operations will continue as now, at least until July 2009, with emphasis placed on improving response quality and timeliness and building up staff competencies in the provision of virtual reference services.

## 3. Benefits and/or Cost of not doing

Benefits:

- Ubiquitous user access to relevant 21<sup>st</sup> century reference services
- Consistent user experience in Virtual Reference services
- Increased positioning of libraries as visible within the community, and visible within the digital environment;
- Increased trust and reliance in the relationship between NSLA partners
- Creation of a culture of innovation and an understanding in NSLA libraries of the need for continual redesign of services
- Improved capability of staff
- Increased opportunity for user access at 'point of need'

Costs of doing nothing:

- Risk of increasing irrelevance of current service offering;

- Greater disparity in capability of partner libraries;
- Greater inequity in services across Australia and New Zealand;
- Skills obsolescence: widening of gap between user requirements and staff capacity to deliver;
- Services offered by individual libraries may create unsustainable resourcing demands

#### 4. Key Stakeholders Requirements

Stakeholder	Requirements - Impact	Requirements - Input
NSLA Executive members		Sponsorship & support per agency and across project
NSLA partner libraries	Expectation of Collaborative involvement;	To participate in development of project; Sponsorship & support for project; Commitment to strategy; Commitment to transition to new business model; Commitment to provision of resources;
Library Staff – all libraries	Changes to work practices; Skills development;	Provision of resources;
Public libraries	May be users;	May provide resources;
Other library sectors	May be users;	May provide resources;
Existing & Potential Users of Information Services	Provision of services through new business model;	Analysis of user evaluations/feedback; Testing/evaluation of new services;

#### 5. Assumptions and Constraints

##### 5.1 Assumptions

- The scope of the project extends well beyond the existing AskNow service model. The AskNow service platform is only one of many channels and models to deliver reference services in the continually changing digital environment.
- As a result of the project, the AskNow service may not continue in its current format.
- Collaboration can be expressed in a number of ways: it may be a shared delivery model or a shared commitment to standards of reference provision and to future directions for reference.

##### 5.2 Constraints

- There is a need to define a feasible model which recognises the great variation in the organisational capacity and technological capability of each of the NSLA partner libraries.

- There is a need to develop a model capable of flexibility and agility to accommodate future user requirements as well as technological developments. Any future model needs to readily adapt to include new components without the need to readdress the strategic vision.

## 6. Estimated Costs

### 6.1 External Labour

(For cost use a range)

Role	Days	Rate*	Total Cost
Facilitated workshop for strategy development			\$12 - \$17,000

\* Use N/A if not applicable

### 6.2 External Non-Labour Costs

Item	Costs

### 6.3 Internal Labour Costs (i.e. absorbed cost)

NB: Labour identified excludes any resourcing for service delivery, and will resource strategy and business model development. Costs are for Stage 1 only: November 2008 – October 2009

Agency	Role	Duration	Rate*	Cost*
SLV	Project Manager	Equivalent 1.0 EFT - 12 months	VPS 5.1 (+ oncosts)	\$92,562
Per NSLA Partner Library	Project Group participation	Equivalent 0.1 EFT – 12 months	VPS 5.1 (+ oncosts)	9 X \$9,256 (\$83,304)
Per NSLA Partner Library	Work/Research Group participation	Equivalent 0.1 EFT – 12 months	VPS 5.1 (+ oncosts)	9 X \$9,256 (\$83,304)
SLV / NLSA Partner library	IT and web development and testing	Unknown at this stage		

\* Use N/A if not applicable

### 6.4 Internal Non-Labour Costs (i.e. absorbed cost)

Item	Costs

**Total Project Costs** \$

6.5 Ongoing costs

Item	Costs

**Total Ongoing Costs** \$

**7. Estimated Schedule**

Activity	Timing	Duration
Stage 1: Investigation – Research & Development of Strategy	November 08 – April 09	6 months
Stage 1: Development of Business Model	May 09 – October 09	6 months
Stage 2: Transition in Services	November 09 – April 10	6 months

**Total Duration**

**8. Major Risks and Controls / Treatment Plans**

Major Risks	Controls / Treatment Plans
Partner library unable to resource best business model recommendation	Business model to be developed in close consultation with all partners, and to be fully endorsed by NSLA Governance Committee.
Partner library may not commit to full project	As per Memorandum of Agreement, notice of withdrawal applies.
Competing priorities within partner libraries	Sponsorship and support from CEO to maintain commitment to project.
Gap between strategic direction and practice in partner libraries	Each partner library to manage staff capability within its own jurisdiction.
Insufficient funds to meet requirements of best business model recommendation.	Business model and budget to be developed in close consultation with all partners, and to be fully endorsed by NSLA Governance Committee.
Inadequate and inequitable technical infrastructure to support services to be	Technical infrastructure audit required across all partner libraries.

delivered.	Issue to be raised with NSLA Governance Committee.
Inability for partner libraries to respond with agility to project needs and to user needs.	Committee for action to be developed in close consultation with all partners, and to be fully endorsed by NSLA Governance Committee.
In consideration of any collaborative delivery, there will need to be central coordination and perhaps resourcing for service administration, support and training. This is currently unresourced.	Business model and budget to be developed in close consultation with all partners, and to be fully endorsed by NSLA Governance Committee.

## 9. Related Projects

Impacts, Interdependencies, Possible Duplication

Project 2 – Open Borders

Project 6 – Changing capability and culture

Existing virtual reference services in partner libraries

Existing virtual reference staff / teams in partner libraries.

## 10. Estimated Investigation Costs (If required)

External Labour

Role	Days	Rate*	Total Cost
Facilitated workshop for strategy development			\$12 - \$17,000

Internal Labour and Non-labour Costs: November 2008 – April 2009

Agency	Role	Duration	Rate*	Cost*
SLV	Project Manager	Equivalent 1.0 EFT - 6 months	VPS 5.1 (+ oncosts)	\$46,281
Per NSLA Partner Library	Project Group participation	Equivalent 0.1 EFT – 6 months	VPS 5.1 (+ oncosts)	9 X \$4,628 (\$41,652)
Per NSLA Partner Library	Work/Research Group participation	Equivalent 0.1 EFT – 6 months	VPS 5.1 (+ oncosts)	9 X \$4,628 (\$41,652)

## 11. Estimated Duration of Investigation (If required)

Weeks/Days: 26 weeks

## 12. Proposed Steering Committee Members

**NSLA Virtual Reference Project Group**

Library	Name	Email address
SLV	Leneve Jamieson, SLV	ljamieson@slv.vic.gov.au
SLSA	Nel Svendsen, SLSA	svendsen.nel@slsa.sa.gov.au
NLNZ	Roger Swanson	roger.swanson@natlib.govt.nz
SLNSW	Josephine Hennock	jhennock@sl.nsw.gov.au
SLNSW	Grazyna Tydda	gtydda@sl.nsw.gov.au
NLA	Margy Burn	mburn@nla.gov.au
SLWA	Susan Ashcroft	susan.ashcroft@slwa.wa.gov.au
ACTLIS	Janice Biggin	janice.biggin@act.gov.au
SLTas	Susan Witek	susan.witek@education.tas.gov.au
NTL	John Richards	john.richards@nt.gov.au
SLQ	Sandra Duffield	sandra.duffield@slq.qld.gov.au