

CLEVELAND PUBLIC LIBRARY

Finance Committee

June 16, 2011

RESOLUTION TO ACCEPT LSTA GRANT TO ADMINISTER KNOWITNOW

- WHEREAS, The KnowItNow Suite of virtual services was initiated by Cleveland Public Library and the CLEVNET Consortium in 2001; and
- WHEREAS, In July 2004, KnowItNow evolved into a statewide program provided by three (3) equal library partners: Cleveland Public Library, Northeast Ohio-Regional Library System (NEO-RLS) and Cuyahoga County Public Library and was funded for a period of three (3) years with LSTA federal monies awarded by the State Library of Ohio; and
- WHEREAS, Pursuant to an evaluation conducted in 2006 by Kent State University School of Library and Information Science, the State Library of Ohio asked that the KnowItNow statewide virtual service be consolidated under one organization, Cleveland Public Library, rather than operating as a partnership; and
- WHEREAS, For the four (4) Fiscal Years commencing July 1, 2007 through June 30, 2011 the Board of Trustees has accepted the State Library Board's award of LSTA grant to continue this statewide virtual service; and
- WHEREAS, In May 2011, the State Library Board awarded a LSTA grant in the amount of \$495,215.76 to Cleveland Public Library for the continued administration of KnowItNow for the period July 1, 2011 through June 30, 2012; now therefore be it
- RESOLVED, That the Cleveland Public Library Board of Trustees accept this most recent LSTA grant in the amount of \$495,215.76 from the State Library of Ohio; and be it further
- RESOLVED, That the Cleveland Public Library Board of Trustees expresses its appreciation to the State Library of Ohio for the continued funding of KnowItNow.



**2011 – 2012
LSTA Grant Proposal**

**Cleveland Public Library
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Submitted by

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**KnowItNow24x7
2011-2012
LSTA Grant Proposal**

- Introduction -

Cleveland Public Library is requesting LSTA funding for July 2011 through June 2012 to administer KnowItNow24x7, Ohio's collaborative virtual reference project. Beginning solely as a statewide online chat service, KnowItNow24x7 now incorporates email, instant messaging, and texting (SMS) and offers localized chat, text, and instant messaging options for Ohio libraries. Through the use of technology, this vibrant component of the state's library services complements the State Library of Ohio's vision of "ensuring the delivery of all information and library services to all Ohio residents, anywhere, anytime" by extending hours and locations to get professional assistance for one's information needs.

Ohio can be rightly proud of the fact that KnowItNow24x7 remains one of the busiest statewide virtual reference services in the country. From July 2010 through March 2011, librarians working with KnowItNow24x7 handled a total of 59,639 sessions – an average of over 217 sessions per day. Since its inception as a statewide service, KnowItNow24x7 has received questions from residents of every Ohio county amounting to almost 700,000 sessions handled overall. Due in large part to the service's nationwide reputation, the KnowItNow24x7 Statewide Coordinator was chosen in 2010 to serve as Co-Chair of the American Library Association's Virtual Reference Services Committee.

All in all, 2010 – 2011 saw a number of positive developments and these will continue to bear fruit and lay the groundwork for more enhancements to the service in 2011 – 2012.

- Selected Activities from 2010 – 2011 -

Text Messaging Comes To KnowItNow24x7

One of the most significant changes occurring during the 2010 – 2011 grant year was the incorporation of text messaging into KnowItNow24x7. Through negotiations with Mosio (a software company based in San Francisco, CA), KnowItNow24x7 was able to provide Ohioans with the ability to send questions to the service's public and academic sides via text message.

The contract with Mosio also included an option for KnowItNow24x7-participating libraries to purchase a greatly-reduced annual subscription for local text message reference services using the statewide infrastructure. This provided an additional benefit to participating libraries and a potential incentive for non-participating libraries to join the collaborative project. Several libraries have already decided to take advantage of the local texting option including The Lane Libraries, the State Library of Ohio, Greene County Public Library, Medina County District Library, and Bowling Green State University.

The KnowItNow24x7 Web Services Coordinator worked with Mosio to integrate text messaging into the service's regular workflow. The Statewide Coordinator created a number of online

training materials and also provided the opportunity for librarians to practice with the texting before it went live. A prominent notice of the new service was added to KnowItNow.org on February 14, 2011; and, as of the end of March, there were 267 incoming text messages submitted to the statewide and local texting services. In April, Cuyahoga County Public Library included the KnowItNow24x7 text option in their new mobile application.

KnowItNow24x7 as an Ohio Educational Asset

With a stake in the training of future librarians in general and the future of online reference specifically, KnowItNow24x7 continued to partner with Kent State University's School of Library and Information Science during the Fall 2010 semester. Dr. Miriam Matteson invited the Statewide Coordinator to work with her *Information Sources and Reference Services* class to facilitate students' participation in KnowItNow24x7 to give an authentic sense of providing reference service through online chat technology. Additionally, Dr. Matteson said "this assignment made the concepts much more real than had [the students] only completed assignments 'for my eyes only'." She is planning on offering ideas for even more improvements to the project, and the Coordinator is looking forward to working with her and future classes of students.

KnowItNow24x7 also continues to be included in INFOhio's *21 Essential Things for 21st Century Learning* for Ohio K-12 teachers and librarians. K-12 students continue to be a major population utilizing KnowItNow24x7, and they accounted for 70% of all users from July 2010 through March 2011.

Finally, KnowItNow24x7 continues to offer internship opportunities for both KSU-SLIS students as well as librarians wanting to hone their reference and online customer service skills. Through regular feedback and constructive criticism from the Statewide Coordinator, interns can immediately put what they learn into practical use.

Continuing Grassroots Empowerment and Community-Building

Grassroots involvement by individual KnowItNow24x7 librarians continued as well in 2010 – 2011. To provide sources of authoritative information to librarians, the Pathfinder Editorial Committee for KnowItNow24x7 (PECK) went into action this grant year. The charge of this new committee, comprised of public and academic librarians, was to both create as well as edit subject guides added to the KnowItNow24x7 Provider site. So far, twenty-six "pathfinders" have been added on subjects ranging from medical information to readers advisory. The guides are freely available online to librarians as well as the public. KnowItNow24x7 librarians staffing the service are encouraged to provide their expertise in this on-going project.

Another community-building activity in 2010 – 2011 was the inauguration in August of KnowItNow24x7's Twitter account (@KIN24x7). This allowed the sharing of information with participating librarians and others interested in the work of the collaborative service. The Twitter feed has been used to provide KnowItNow24x7-related updates as well as pertinent news items and resources of interest to librarians staffing the service. @KIN24x7 got its 100th follower in March 2011.

Launched in September 2010, regular online forums hosted through the existing KnowItNow24x7 software platform provided a number of community-building benefits: facilitating information-sharing between librarians and the Coordinators, building stronger relationships among participating librarians, and providing a way for librarians to become more familiar with the features of the software platform.

- Proposed Enhancements for 2011 – 2012 -

Over the course of the 2011 – 2012 grant year, Cleveland Public Library is looking forward to facilitating enhancements to KnowItNow24x7 for patrons as well as continuing to contain and share costs with other partners. Furthermore, participating libraries and frontline librarians will continue to be empowered by the sharing of information, the supplying of resources, and the exploration of ways to make KnowItNow24x7 even more locally relevant. The following is a summary of proposed initiatives for the upcoming grant cycle:

Exploration of Mobile Applications

The prevalence of mobile applications (“apps”) for cell phones and other mobile devices will be an area of investigation and possible integration in the coming year. This is a direction in which many services (not just online reference) are headed, and patrons have expressed interest in having a KnowItNow24x7 app. The issue of multiple platforms must be addressed, and KnowItNow24x7 will investigate how to provide an even more streamlined experience for patrons from their mobile devices.

Integration of Social Media Options for Patrons

To continue providing new options through which Ohioans can interact with KnowItNow24x7, the project plans to investigate using social media resources like Twitter and Facebook as entry points to the service for patrons in the coming year. Along with an app, this is another suggestion from patrons of the service. Various logistical and technological concerns will be explored to address the feasibility of integrating messages from social media sites into the existing KnowItNow24x7 workflow. Both the social media portal and mobile apps would allow KnowItNow24x7 to be accessed by patrons on-the-go more easily instead of requiring them to use one designated web interface.

Enhancement of Web Presence for Patrons and Librarians

KnowItNow24x7 will be looking at a number of enhancements to both its public (www.knowitnow.org; academic.knowitnow.org) and librarian (provider.knowitnow.org) web sites including streamlining the process for patrons to submit their questions, providing statistics in a user-friendly and visually-appealing format, and making it easier for librarians to search transcripts.

Initiation of Peer-to-Peer Mentoring and Individual Accountability

In an effort to continually improve the quality of service available through KnowItNow24x7, the feasibility and logistics of a peer-to-peer mentoring arrangement among librarians will be investigated. In cooperation with the existing Quality Assurance Committee for KnowItNow24x7, this new initiative would serve to make librarians more aware of their performance and provide mutual, collegial encouragement and feedback. This project would be

facilitated by some of the proposed enhancements to KnowItNow24x7's web presence outlined above.

- Current Service Model: Concerns and Alternative Strategies -

As a collaborative statewide project, KnowItNow24x7 has always relied on libraries voluntarily providing staff to assist patrons during daytime and early evening hours. Those libraries that have volunteered to serve patrons through the statewide project are to be commended, and their contribution is invaluable. However, only a little over 15% of Ohio public libraries (39 out of 251) actively participated in KnowItNow24x7 in 2010.

The patrons of libraries *not* actively contributing staff time to the service in 2010 initiated almost 45% of all live sessions on the service. All Ohioans should ideally have easy access to KnowItNow24x7; however, libraries not participating in the work of the service obtain the benefits of the collaborative endeavor without sharing in its workload. This situation puts more stress on those libraries who do volunteer to provide service, increasing the pressure on them and, in the end, making it more likely that they may discontinue their participation.

Historically, Cleveland Public Library (CPL) handled around 40% of all sessions on KnowItNow24x7. In the past few years, CPL administration expressed concern over this disparity, asked that ways be explored to alleviate the stress on its librarians, and reduced the library's hours in 2010. Additionally, some libraries staffing evening shifts left the service, and this added to the stress on libraries remaining in those times. In an effort to fill gaps in coverage and to more evenly distribute the KnowItNow24x7 workload, NEO-RLS AfterDark was asked to schedule staff during some daytime and early evening shifts, increasing their share of patrons served by approximately 10%. As a result, in 2010, NEO-RLS AfterDark staff and CPL librarians still handled, respectively, 40% and 28% of all live sessions. This continuing reliance on a paid subcontractor or single library for handling the majority of sessions is not a viable strategy for future growth of the service.

On-going attempts to significantly increase the number of libraries providing in-kind contributions of staff time have proved largely unsuccessful. Grassroots advocacy from participating library staff and administrators has been encouraged from the beginning of the service, but this has proved insufficient. Since 2008, the Statewide Coordinator has consistently raised awareness of the issue of low participation, directly contacted library directors, shared statistics and information, and offered local incentives for joining the collaborative. Even with all these efforts, there has been a 5% net loss since 2006 of public libraries actively participating in KnowItNow24x7.

The official partnership with OhioLINK (which began in April 2008) did add a number of academic libraries to the KnowItNow24x7 roster; however, these librarians only assist in handling OhioLINK students and those choosing a post-secondary grade level on the public service (approximately 16% of all sessions).

In an effort to continue to provide quality online reference service to KnowItNow24x7 patrons, the following are a sampling of possible ways to address the imbalance in library participation or to more equitably distribute the workload of the collaborative:

Minimum Level of Reciprocal Service Requirement

The patrons of several non-participating libraries generate a significant number of sessions on KnowItNow24x7 including Hudson Library & Historical Society (8th most active patrons for initiating sessions in 2010), Pickaway County District Public Library (10th most active), Portage County District Library (11th most active), and Stark County District Library (14th most active). Negotiation at state and local levels would be involved in requiring libraries with historically high numbers of patron-initiated sessions to contribute staff time to the collaborative project, but this would more equitably distribute the KnowItNow24x7 workload across institutions actually contributing to that workload.

Routing Patrons from Non-Participating Libraries to their Local Library

Those patrons initiating a chat session from a ZIP code served by a non-participating library could be re-routed to a contact form hosted by their local library. The patron would also be provided with a message stating their local library does not contribute staffing to KnowItNow24x7, the reasons why participation is important, and an invitation asking them to encourage their local library to join the collaborative effort (possibly with a form or contact information).

Offering Email Alternative for Patrons from Non-Participating Libraries

Those patrons initiating a chat session from a ZIP code served by a non-participating library could be offered a leave-a-message form to be answered by the KnowItNow24x7 librarians handling email. These patrons' questions would still be answered; they simply would not access librarians staffing the live service. Those librarians staffing the live service could then concentrate on patrons coming from libraries providing reciprocal service on the network.

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2011 – 2012 LSTA Grant Proposal			
-- Budget Summary for KnowItNow24x7 --			
<i>Line Item</i>	<i>Description</i>	<i>2011-2012 Expenditures</i>	<i>Contractor</i>
	Platform & Support		
1	Software, Hosting, and Support	\$34,000.00	SourceN; Mosio; Cleveland Public Library (CPL)
2	KnowItNow24x7 Statewide Coordinator: Full-time (scheduling, training, planning, promotion, communication, etc.)	\$86,000.00	CPL
3	KnowItNow24x7 Web Services Coordinator: Full-time (tech support, programming, server maintenance, etc.)	\$83,500.00	CPL
4	Training	\$1,380.00	CPL
5	Marketing	\$1,000.00	CPL
6	Travel, Meetings, and Conferences	\$7,500.00	CPL
7	Equipment Program Expenses	\$1,200.00	CPL
Subtotal	Platform & Support	\$214,580.00	
	In-Kind Library Service Coverage		
8	Daytime and Early Evening Reference Staff	In-kind	Ohio public, academic, and special libraries
	After-hours Coverage		
9	KnowItNow24x7 AfterDark coverage	\$266,212.00	Northeast Ohio Regional Library System
Subtotal	Lines 1-10	\$480,792.00	
	Administration Costs		
10	3% of lines 1-10	\$14,423.76	CPL
TOTAL	2011-2012 LSTA Grant Request	\$495,215.76	

KnowItNow24x7
2011-2012 LSTA Grant Request
Budget Justifications and Details

1. **Software, Hosting, and Support:** This line covers the statewide SMS/texting contract with Mosio, the technical support with Source(N) for the SparkRef/Openfire software platform, costs of further development of the SparkRef/Openfire platform to remain current and enhance reference service, and incidental funds to purchase selected print reference manuals on specific software and programming topics to adequately support and augment the platform. Cleveland Public Library (CPL) supplies hosting hardware (i.e., servers, etc.) as an in-kind contribution for the SparkRef/Openfire platform.
2. **KnowItNow24x7 Statewide Coordinator:** This line covers one FTE (including benefits: OPERS, health insurance, Medicare and life insurance). This position oversees information-sharing and quality control of the service; coordinates implementation of new aspects of the service; recruits additional libraries to contribute staff time to handle sessions; schedules day-time providers; acts as liaison with partners; and organizes, facilitates, and coordinates regional and local efforts to provide training and grassroots marketing efforts.
3. **KnowItNow24x7 Web Services Coordinator:** This line covers one FTE (including benefits: OPERS, health insurance, Medicare and life insurance). This position coordinates configuration and maintenance of the SparkRef/Openfire software, maintains databases and web pages, manages upgrades, provides necessary coding for reports and enhancements, and assists in coordinating daytime and early evening staffing. This person also provides day-to-day technical support for participating librarians and is also on-call after-hours.
4. **Training:** This line covers the cost of two Dimdim web conferencing software licenses (in collaboration with CPL) to enhance the ability of training new KnowItNow24x7 agents; to improve current agents' skills; to facilitate meetings of the Quality Assurance Committee, Pathfinder Committee, and other committees as they become necessary; and to share information with virtual reference stakeholders. The Dimdim software also allows the Web Services Coordinator the ability to troubleshoot software issues with remote KnowItNow24x7 providers.
5. **Marketing:** This line covers the costs of materials to promote KnowItNow24x7 to the public, educators, librarians, administrators, and other stakeholders within Ohio.
6. **Travel, Meetings, and Conferences:** This line covers the expenses of traveling to meet with local KnowItNow24x7 libraries and librarians within Ohio for training, to present and exhibit at conferences to promote KnowItNow24x7, to explore potential partnerships with regional or statewide virtual reference services, and to engage in professional meetings to maintain KnowItNow24x7's national reputation.

7. **Equipment Program Expenses:** This line covers the cost of cell phone and monthly cell phone charges for the Web Services Coordinator and the Statewide Coordinator.
8. **Reference Staff:** Ohio public, academic, and special library staff will provide reference service during open hours as an in-kind contribution to the service as part of their regular library duties.
9. **After-hours Coverage:** See Appendix for proposal submitted as quote for 2011-2012 AfterDark coverage by the Northeast Ohio Regional Library System (NEO-RLS). This year's NEO-RLS AfterDark coverage was again negotiated and agreed to by the Statewide Coordinators of Ohio's KnowItNow24x7 and Oregon's L-net services and the AfterDark Virtual Reference Service Coordinator.
10. **Administrative Costs:** 3%, Cleveland Public Library

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APPENDIX

**Proposal for
AfterDark Virtual Reference Coverage
submitted by
Northeast Ohio Regional Library System**

Proposal for AfterDark Virtual Reference Coverage NEO Regional Library System – Cleveland Public Library 2011-2012

Introduction

Since 2004, The Northeast Ohio Regional Library System (henceforth NEO-RLS) has been committed to providing high quality Virtual Reference service twenty-four hours a day, seven days a week. With the 2008 partnership between KnowItNow24x7 and Oregon's L-net service, NEO-RLS's Virtual Reference commitment has grown beyond the borders of Ohio.

In these times of library budget reductions and reduced library hours, a twenty-four hour Reference Service is vital to meeting the informational needs of Ohioans. As more and more information is made available online, Virtual Reference Librarians are perfectly positioned to facilitate access and demonstrate the continuing relevance of Librarians as information specialists.

One of the strengths—and commitments—of the KnowItNow24x7 service was clearly stated in the first proposal: “It is now possible to provide direct service between librarian and citizen 24 hours a day, 7 days a week. Providing anything less would be inconsistent with the Ohio library community's reputation as a leader in the application of technology to provide library services.” NEO-RLS believes that this is a commitment to which any institution that manages KnowItNow24x7 must remain firm. NEO-RLS also believes that the cost effectiveness of a statewide online reference service must be considered in conjunction with the other benefits the service has experienced being a 24x7 service:

1. **24x7 Service.** Because of NEO-RLS's AfterDark Virtual Reference Service, every library in the state of Ohio is “open” twenty-four hours a day, seven days a week. 24x7 coverage provides busy Ohioans access to high quality information whenever it fits into their schedule.
2. **AfterDark Virtual Reference Service staffed entirely by Ohio librarians.** Those who hear about the AfterDark service are impressed that AfterDark is staffed by Ohio librarians. AfterDark librarians are frequently asked “where” they are, and patrons have stated that they are pleasantly surprised that we are from Ohio, and possibly may even be their own local librarian. AfterDark's Ohio-based service also fosters buy-in among the daytime librarians. Many of them know one or more of the AfterDark librarians, and consider them a vital part of the KnowItNow24x7 team.
3. **Direct control of customer service.** The AfterDark Librarians are continuously monitored and evaluated by the Project Coordinator. The Project Coordinator works closely with KnowItNow24x7 management to ensure the highest level of customer service.

Therefore, NEO-RLS submits this proposal to provide a vital component to the KnowItNow24x7 service from July 1, 2011 through June 30, 2012. This service includes ALA accredited MLS Librarian coverage, online chat, instant messaging, text messaging, email (3am - 7am) and other text based reference coverage.

Expenses: \$266,212

After Hours Reference Staff: \$196,595

Live reference service coverage at the rate of \$20.00/hr based on the schedule outlined by the KnowItNow24x7 Coordinator. Including KnowItNow24x7/L-net shared hours (split 75.6% KnowItNow24x7 and 24.4% L-net) and KnowItNow24x7 only hours as per Cleveland Public Library's Request for Virtual Reference Librarian Coverage.

After Hours Supervision: \$56,510

- 24 hours a day/7 day a week management of the AfterDark service and the librarians, including evaluation, scheduling, supervising, communications, support and troubleshooting, training, collecting statistics, maintaining the Extranet website, and payroll.
- Communicating with the KnowItNow24x7 Coordinator to troubleshoot, and ensure high quality Virtual Reference and customer service.
- Providing Virtual Reference service during AfterDark shifts, as needed.
- Maintenance of the KnowItNow24x7 Wiki knowledge database.

Material & Equipment Program Expenses: \$ 4,105

Home Internet, Cellular Phones, Postage, Paper, Training, Contracts and Misc. Printing, Misc. Office Supplies, Hardware, Software and Equipment.

Administrative costs: \$ 9,002

3.5% to cover staff support from NEO-RLS Fiscal Officer, Administrative Assistants, and Technology Department. Also includes rent and cleaning for one office, electric, heat, water, phone service including long distance, use of NEO office equipment (printers, photocopier, fax, projector, computer cables), use of video equipment and sound studio, use of staff room and facilities, access to professional literature, use of meeting room and conference rooms.