POLICIES AND PROCEDURES

The Nuts and Bolts of Virtual Reference

One of your challenges in establishing a virtual reference service is development of guidelines—all of the policies and procedures that form the foundation for your new service.

Real-time chat reference differs from in-person reference and even from e-mail reference. The policies that your library created for these other modes of reference do not necessarily apply to a chat reference environment.

Here are some of the questions that your policies and procedures may need to address.

Setting up the service

How will users be involved in shaping the service? What kind of a team will you need to assemble for decision-making and coordination? Who will be responsible for technical problems? Database licensing issues? Creating and maintaining scripts? Where will the staff providing the service be located? If librarians are also working at a public reference desk, how will you handle serving both in-person and virtual patrons? Will librarians work from home?

Scope of service

Who may use this virtual reference service? If a library card or student ID is required, how will you authenticate the user? What types of questions are appropriate? Do you need a disclaimer about medical or legal questions? How will you handle frequently asked questions? Alert colleagues to repetitive questions (e.g., homework assignments)?

Evaluation

What are your goals for this new service? What types of data will you collect to measure progress towards these goals? How will you evaluate the cost of the service? What data are needed to demonstrate its impact?

Virtual collections

Will you create a Web page of starting points, links to databases, recommended Web resources, etc., for the staff providing virtual reference?

Referral of questions and follow-up

How will questions be referred to another librarian or to a subject expert? What about telephone call-back or e-mail follow-up? Patrons with undeliverable e-mail addresses? How will you handle specific questions about circulation issues or ILL?

Staffing

How many people will be needed to staff the new service? (Preferred Solutions provides a Workforce Calculator for staffing a call center.) Who will you choose? Will librarians be the only ones answering questions? What about trained paraprofessionals or students? Should real names be used by the staff? Who will coordinate the scheduling of staff?

Hours of availability

When will the service be available? Holidays? Will the hours of service vary during the academic year?

Databases and document delivery

Are there any licensing issues connected with the library's proprietary databases? Authentication issues? How will you deliver print materials to the patron? Will a scanner or fax machine be available?

Administration

Who will administer the service? What is that person's role? Does this person supervise the staff providing the service? Who has access to the transcripts? Who reviews the transcripts? Do you want peer review? What mechanisms will you set up for staff to share experiences, and to clarify and refine your policies and procedures?

Confidentiality

Will any identifying information be connected to the transcripts? If using transcripts for evaluation and training purposes, how will you ensure the privacy of the users? How will you communicate your privacy policy to users?

Patron conduct

How will you handle harassment, inappropriate language, rudeness, misuse of the service, etc.? Will you deny service to anyone who violates your rules of conduct? Will you establish any limits on the number of questions? Time limits?

Time to Explore

1) Use the Policies and Procedures for Virtual Reference Tables.

2) Select three examples from each section (Service Overview for Users, Examples of Privacy Statements, Guidelines for Staff) to review.

3) Use the note-taking form to record your impressions and relevant examples.

4) Summarize your thoughts on policies and procedures for virtual reference service and post your summary to the virtual reference training listserv.