

## **Taking “Anytime, Anywhere Answers” Home: An Extension of the Each One, Teach One Approach**

Participating in the complete five-week, blended learning VRS training class is the preferred and most beneficial way that library staff members can learn about virtual reference service. However, it is likely that many libraries will be unable to register all reference staff for the course. The Statewide Virtual Reference Project coordinator, training curriculum developers, and steering committee members encourage libraries to develop in-house training that can be shared with colleagues by those who complete the full “Anytime, Anywhere Answers” course.

The following curriculum is based on a training workshop offered during all-staff day at City University. It was delivered by several VRS training graduates and incorporates both highlights from the class and attention to locally relevant concerns. Options for alternative or additional activities are included. The length of time devoted to individual activities will vary according to local need and interest. Most of the handouts are based on “Anytime, Anywhere Answers” materials. The training should emulate the interactivity of the complete course—asking questions, eliciting suggestions, and generally encouraging participation by all in attendance. This may be aided by listing participant answers or comments on large sheets of paper, tape or video recording sessions for replay, asking/assigning note-taking duties to an individual, or otherwise providing some permanent record of the event.

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1. Introduction to Virtual Reference
  - 1.1. Content: presentation and discussion. It is recommended that the presenter(s) ask participants to identify the skills necessary to deliver virtual reference service, then review the VRS core competencies.
    - 1.1.1. Technical skills (e.g., Windows, multitasking, keyboarding, troubleshooting)
    - 1.1.2. Web skills (e.g., Internet and database searching, netiquette, site evaluation, “chatspeak”)
    - 1.1.3. Reference skills (e.g., information literacy instruction, reference interview and question negotiation, use of scripts, application of policies)
  - 1.2. Handouts:
    - 1.2.1. Core competency list
    - 1.2.2. *Keys to Organizing Your Virtual Reference Desk* (all or excerpts from VRS training document)
    - 1.2.3. *Getting Chatty: Conversation at the Virtual Reference Desk* (all or excerpts from VRS training document)
  - 1.3. Options: Include discussion of the evolution of virtual reference (based on VRS training document *Virtual Reference: A Work in Progress*)
  - 1.4. Suggested time frame: 60 minutes.
2. Chat simulation
  - 2.1. Content: Practice using the local virtual reference software on library workstations, with participants alternating as librarian and patron.
  - 2.2. Handouts:
    - 2.2.1. Practice questions (typically asked by local patrons)
    - 2.2.2. Instructions for patron and librarian roles using local application, plus tips as appropriate
  - 2.3. Options: Explore use of different features, such as co-browsing or demonstrating use of licensed databases
  - 2.4. Suggested time frame: 30-45 minutes
3. Development and use of scripts
  - 3.1. Content: Discuss types of messages that are appropriate to scripts for local library use and ask participants to suggest specific wording. Handouts

- 3.1.1. List of examples of scripts used at a library of similar type and size.
        - 3.1.2. Guidelines for writing scripts.
      - 3.2. Options: Discuss ways in which scripts can be used effectively and explore possible misuse or overuse.
      - 3.3. Suggested time frame: 30-45 minutes.
    4. Model reference behaviors in chat
      - 4.1. Content: Discuss the reference interview: setting the tone, clarifying questions, keeping the patron informed, providing information, and following up. Compare and contrast chat reference with telephone and in-person service. Provide and ask for anecdotes from real reference transactions.
      - 4.2. Handouts
        - 4.2.1. *RUSA Guidelines for Behavioral Performance of Reference and Information Services Professionals* (available on the ALA/RUSA web site)
        - 4.2.2. Digital Reference – Question Negotiation (attachment A)
        - 4.2.3. Bibliography of recommended readings
      - 4.3. Options: Select a Secret Patron scenario from VRS Training and discuss approaches to handling it in a virtual reference transaction.
      - 4.4. Suggested time frame: 60minutes
  5. Visiting other Virtual Reference services
    - 5.1. Content: Participants explore web pages of a libraries offering virtual reference, then the group critiques the site.
    - 5.2. Handouts
      - 5.2.1. Virtual Field Trip Questions (VRS training document)
      - 5.2.2. List of links to VR services
      - 5.2.3. Discover Chat Service on the Web (attachment B)
    - 5.3. Options: Ask participants to log on to the VR service and ask a question from the list provided in 2.2.1, then compare the software and service with the chat simulation completed in 2. All participants should explore the same library web pages as the basis for the discussion.
    - 5.4. Suggested time frame: 45-60 minutes (20-30 minutes each for discovery and discussion)
  6. Transcript evaluation

- 6.1. Content: Participants read and critique virtual reference transcripts, referencing the model reference behaviors discussed in 4.
- 6.2. Handouts:
  - 6.2.1. VR transcripts (2-5, possibly using those provided in VRS training)
  - 6.2.2. *Sharing Your Experience: Evaluating Transcripts* (VRS training document)
- 6.3. Options: Break the participants into groups, with each one responsible for a different transcript. Ask each group to report its assessment.
- 6.4. Suggested time frame: 30-45 minutes.
7. Open forum: Offer a half-hour or so for a discussion of the day's activities—final thoughts, impressions, fears, ideas, inspirations, observations.
8. Alternative training topics
  - 8.1. Handling problem patrons
  - 8.2. Handling patrons from other libraries in your local consortium
  - 8.3. Review local policies and procedures that may need revision for use in VR
  - 8.4. Discuss staffing issues: VR on or off desk, length of VR duty for an individual, referring to email or to other libraries/experts.

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### Attachment A. Digital Reference Interview – Question Negotiation

The following list of challenges in conducting reference transactions in the online environment was compiled from the DIG\_REF online discussion list.

- Lack of verbal and physical cues make question negotiation more difficult
- Lack of feedback on materials provided to the patron
- Multiple email reference interviews can take an extended period of time
  - Some patrons prefer this method, finding it less stressful
  - 1/3 of patrons don't respond to follow-up email interview questions (from Patricia Memmott at IPL)
- More staff training is required for chat than for desk reference
- Having to write out the question may help a patron think more about what they are asking
- Probe query is emerging where a patron asks a portion of their question. Once some sort of answer is offered, they then feel free to add more detail and are more precise about their needs
- Different methods for asking questions of librarians suit different users at different times
- Forms with multiple fields may be developed to serve as a sort of reference interview mechanism, but patrons using chat may be hurried and not complete the fields
- Perceived time pressure may influence/attenuate the librarian's reference interview in the chat environment
- Estimate of average chat session is 10-20 minutes; consider the trade-off between response time and depth of response

### Facets of Quality in Digital Reference Services from Virtual Reference Desk

(<http://www.vrd.org/>), 2000. This list provides insight into what is considered good reference in the digital environment:

- Accessibility
- Prompt turnaround
- Clear response policy
- Interactive
- Instructive
- Authoritative
- Trained experts
- Private
- Reviewed
- Provides access to related information
- Publicized

The draft of the University of Washington Guidelines for Virtual Reference provides the following structure for participating librarians:

- Databases and websites are primary resources used to answer questions
- Look for instructional opportunities
- Chat reference most resembles telephone reference; refer patrons as necessary to complete the transaction
- Maintain ongoing communication so it is evident that you're working on the question
- Do not push resources that the user will not have access to later; always cite source pushed
- Strike a balance between friendly conversation and professionalism
- Time spent on answer is up to discretion of the staff member
- Assure websites match criteria of accuracy, authority, objectivity, currency, and coverage

Food for thought:

In the classic article "Question Negotiation and Information Seeking in Libraries," Robert S. Taylor describes reference questions not as commands but as descriptions "of an area of doubt in which the question is open-ended, negotiable and dynamic." His vision in 1968 included moving libraries from "passive warehouses to dynamic communication centers." Studies cited in this article show that the ease of access to information exceeds in importance the amount or quality of information retrieved.

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### Attachment B. Discover Chat Service on the Web

1. What name or terminology did the library give to their digital reference service? Was the name consistent across all pages? Did the name accurately describe the service? How would you rename the service?
2. Was the link, button or path to the chat service easy to locate? How accessible was it? Were there other links that you tried first, believing they would lead to the VR service? What were they called? Was the service available from more than one page? What did the logo (if any) look like? Did its design seem appropriate and inviting for the library?
3. Were you led to a page that gave you all options for reference (phone, web form, chat, face to face)? Or did the link lead straight to the chat service.?
4. What chat software does this library use? Was it apparent that you would need particular plug-ins or browser requirements or other technology in order to use it?
5. Was there any information about who would answer your question? Is this library part of a consortium or collaborative digital reference project? Were you informed of the kinds of questions answered here? Did you feel comfortable knowing the scope of their service? Were you given any time limits for your digital reference exchange? Did you feel confident in the accuracy/reliability/relevance of the service?
6. Was information provided about time of day and days on which the service was available? Were any policies or session guidelines offered? Too much, too little? Were you informed about privacy policies and receiving a transcript? Was anything overlooked or were any of the policies or guidelines too structured, restrictive, unclear, or too loose?
7. Was the service open when you visited it? Was there any indication that your question would not be welcome at this site? Would you need to prove that you are a member of the library's community? What differences did you note between public and academic libraries?
8. How many and what fields were required and optional in submitting your virtual reference question? Would you add or delete any fields? Why?
9. What did you think of the interface for your question entry and dialogue with the librarian? Do you have design suggestions?
10. What do you like about the site(s) you visited? What details would you like to see on your local library site?
11. What was the overall feel of your visit? What kind of vibes did you pick up? Commendations? Surprises? Suggestions? Interesting details?