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Developing A Chat Reference Training Program

James Cory Tucker

KEYWORDS. Chat Reference, Virtual Reference, Staff Training, Academic Libraries, Case Studies

ABSTRACT. In the last few years, chat reference services have been implemented by public, college and university libraries. One important aspect of the chat reference service is library staff training. Literature shows that this is a vital step in offering a chat reference service. Library staff need to be well-trained in areas of chatting, reference interviewing in a digital environment and using electronic resources, such as the Internet and databases. This article discusses the chat reference training program at the University of Nevada, Las Vegas. The following text provides an outline for establishing a chat training program including planning, organization, implementation and assessment. Areas of discussion include the chat reference interview, chatting and patron management techniques.

Developing A Chat Reference Training Program

Introduction

During the Spring semester of 2003, the University of Nevada, Las Vegas (UNLV) Libraries made the decision to offer a virtual reference service using Online Computer Library Center's (OCLC) *QuestionPoint*. Being a member of the virtual reference committee, the author was asked to undertake the project of training library staff members for the service. This article is a case study of the chat reference training program at UNLV Libraries. The article highlights all aspects of the training program including background research, planning, organization, implementation and a brief description of assessment.

Background Research

In order to undertake such a large project, an extensive background research needed to be conducted to find what types of training programs already existed and also how extensive the training at UNLV Libraries needed to be. The two avenues for research on this topic included a creation of a survey and a literature review

Survey

Prior to starting this project, a Web survey was sent to public and university libraries, who at that time, offered a chat reference service. The survey was created to find out what type of training library staff received for chat reference. In addition, the survey asked respondents about the chat reference experience, including the chat reference interview. The survey was made up of eighteen questions and was delivered electronically, by email, using the Zoomerang service.

Sample

The chat services were found using the *Index of Chat Reference Services* from the Teaching Librarian Website. Once schools were identified, each library page for the school was searched to locate appropriate email addresses for either the chat reference coordinator or Head of Reference. In all, surveys were sent to seventy-four libraries.

Results

Out of the seventy-four emails sent, twenty libraries responded. The response rate is 27.2%. For the purpose of this paper, the questions related to chat reference training will be analyzed. In total, there are six questions specifically related to chat reference training:

Question 6: *Did your library create a formal training program for providing reference using chat software?*

A formal training session was defined as one that discussed reference interview strategies, chatting, library resources, etc. Out of the twenty responses, only four libraries created a formal training session. The rate is only 20%.

Question 7: *How long was your chat reference training?*

Three of the four responses indicated one to two hours. The fourth response indicated three to four hours.

Question 8: *Briefly describe the training you received.*

For this question, there were several types of responses. Responses included software training, chat guidelines, chat tips, types of questions and how to use library's website.

Question 9: *In your opinion, was the training effective?*

The response rate for this question was 100%. All four librarians who

experienced a formal training program were pleased with the program.

Question 11: *If you did not receive training, what self-training exercises did you perform? (Check all that apply).*

The people who took the survey were given the choices of reading articles, spoke with other librarians who use chat, visited other chat sites, approached chat like traditional reference, none and other. The respondents were allowed to submit multiple answers. The response rate for each choice was:

Insert Table here

For the answer “other”, the responses were “attended conferences” and “LSSI had reference training and library had informal meetings to discuss chat reference.”

Question 12: *Do you feel training sessions for chat reference are necessary?*

Of the twenty people who answered this survey, only eighteen responded to this question. The responses were 15 for yes (83%) and 3 for no (17%).

The survey was extremely helpful because it allowed the gathering of information from librarians and library staff who are practitioners of a chat reference service. The information gathered was valuable because it illustrated the fact that the majority of people who participate in chat reference feel it is necessary to have a more detailed training program. This survey matched the same type of results of a survey conducted by the Association of Research Libraries (ARL). The ARL SPEC survey queried 124 ARL members about various topics in chat reference.¹ The results of the questions regarding skills and training found that “69% reported that staff required additional training, primarily in the use of the specific chat reference software and chatting techniques or ‘chattiquette.’” In addition, the results found that “others mentioned the need for

additional training on reference resources and searching the Web.”²

Literature Review

Chat reference has been written about in many journals including both professional and scholarly literature over the last few years. In addition, there have been numerous presentations at conferences, such as the Virtual Reference Desk (VRD) and American Library Association (ALA). The articles concerning chat reference cover numerous topics. The majority of articles focus on developing and implementing a chat reference service including Bennett³, Boyer⁴, Bradbury and Payne⁵, Broughton⁶, Janes, Carter and Memmott⁷, Maxwell⁸, Stemper & Butler⁹, Kawakami¹⁰, and Kibbee, Ward and Wei¹¹. Other articles focus on topics including chat guidelines¹², staffing¹³, chat question types¹⁴, information competency and digital reference¹⁵ and software¹⁶. Additional topics include service quality¹⁷, tools for chat reference¹⁸, librarian experiences and attitudes¹⁹ and assessment^{20,21}.

In reference to chat reference training, some articles discuss the importance of chat training. In her 1999 article, Wasik states that “the development of a comprehensive training plan, including training materials, activities, and tools, is necessary for the preparation of an effective staff²².” Berube agrees “staff training is key, not only to ensure that staff develop effective and efficient information research skills, but also orient them in delivering a new type of service.”²³ The journal literature lacks articles specifically related to establishing chat reference training programs in academic libraries. One publication directly related to chat reference training is the Starter Kit for the AskA service for the K-12 community²⁴. This publication provides a six-step process for creating a chat service and includes a module on training. Some publications briefly

discuss training efforts for chat reference at academic and public libraries. In her presentation at the 2002 ALA Annual Conference, Suanders mentions the training program used at North Carolina State University (NCSU). The training at NCSU entailed the use of two phases²⁵. The first phase was an introduction to the library and library resources. The second phase concerned the chat reference software. In the same presentation, Strobel described the training program at CleveNet Library Consortium²⁶. The training program did not address basic reference skills, but was designed to teach technology related skills. Other articles that mention training programs are Kibbe, Ward and Mai²⁷ and Maxwell²⁸. In addition to these articles, there is other research that discuss specific training items or skills. There are numerous articles that discusses conducting the reference interview in an online environment. These articles include Viles²⁹, Porter³⁰, Rebollo³¹, Taher³², Janes & Silverstein³³ and Smith³⁴. One article by Ward discusses the use of virtual reference transcripts for library staff training.³⁵

When looking at the literature on chat reference training, an analysis shows an interesting fact. Most, if not all of the training programs described focus on the development of similar training skills and concepts. The common thread noted throughout published literature identifies specific training skills include chatting, library resources, conducting reference interview and Windows training.

Additional Information

In addition to the survey and literature review, I monitored the Dig_Ref listserv. As far as training programs are concerned, the listserv contained three listings that discuss training programs. One example was from the *Q and A* project in New Jersey³⁶. The project Website has lots of wonderful ideas for a chat reference training program. In

addition, the Statewide Virtual Reference Project in Washington state has a project Website with great training information³⁷. Another example of a chat reference training program is the Vancouver Public Library³⁸. The Vancouver Public Library created a very detailed, well organized program.

UNLV Libraries

UNLV Libraries serves a population of over 26,000 students including undergraduate, graduate and doctoral students. UNLV Libraries serves a rapidly expanding research institution that creates several new programs each academic year. One example is the creation of the UNLV School of Dentistry, which is located at an off-Campus location. Due to the fact that the school is located off-campus, UNLV Libraries decided to offer a chat reference service to meet the research and information needs of students and faculty. The chat reference service began in the Fall semester of 2003. The service will be expanded in October 2003 and will serve the entire university campus. The chat software that was chosen is OCLC's *QuestionPoint*. Due to the fact that this is a new service, it was decided that a training program should be implemented for all library staff who volunteered to participate in this project.

Training Program

Planning

The initial concern with creating a chat reference training program was structure and organization. The planning aspect was definitely the most crucial part of the program. To assist with planning, the Module 3 from the *AskA Starter Kit* by Lankes and Kasowitz³⁹ was used. Module 3 was not created for an academic library, but it

provides a very detailed planning system and includes an informative outline, which was invaluable to UNLV Libraries' chat training program. The module was far too detailed for our purposes, but it helped identify four areas of planning: creating the training program, producing the training program, implementing the training program and assessing the training program..

Creating the Training Program

Creating the training program involved several steps. Perhaps the most important was identifying the goals for the training program and selecting the content or skills to be acquired. What skills should library staff learn to effectively perform chat reference? The next step concerned how should the training be delivered. Should the training involve one session or several sessions? Should training be delivered using print materials or should a Website be created? What types of teaching methods should be used during the training sessions? Finally, the last concern in creating the training plan is assessment. How should the performance of library staff be measured? How should the training program be evaluated?

Initially, a list of skills or competencies was created. The competencies identified included

- Chat communication skills, including etiquette
- Ability to conduct an efficient and effective reference interview in a chat environment. This includes the use of scripted messages
- Searching the Internet effectively
- Ability to select and search library databases. This skill includes knowledge of remote access and licensing restrictions
- Assist patrons by applying critical thinking skills in locating, using, and evaluating information
- Effectively conduct a collaborative browsing session with a patron
- Efficient and effective use of Windows. This includes keyboard commands, multi-tasking and managing multiple windows

- Ability to use troubleshooting skills to solve technical problems
- Apply chat transaction policies

As far as delivering the training program, it was decided that the training would be divided into three separate sessions, using presentations and group activities. Each session would be matched with a set of goals. The goals specifically relate to the chat reference competencies mentioned previously. The three sessions are as follows:

1. Software Training

- Goal 1: Learning how to use *QuestionPoint* software
- Goal 2: Navigation in an electronic environment
- Goal 3: Software troubleshooting

2. Chat Reference Transaction Training

- Goal 4: Learn chat policies and procedures
- Goal 5: Become familiar with synchronous reference environment
- Goal 6: Learn how to conduct chat reference interview
- Goal 7: Learn patron management techniques
- Goal 8: Hands-on time with *QuestionPoint* software
- Goal 9: Introduction to live reference situation

3. Research and Windows Training

- Goal 10: Ability to search Internet effectively
- Goal 11: Effectively choose and search library databases
- Goal 12: Better use of Windows software

Ideas for assessment were discussed with the Libraries' assessment team and it was agreed the areas that should be addressed were overall assessment of the training program, assessment of training materials and assessment of library staff. The idea was to allow for assessment of the training materials and programs at the end of the training program using a survey. The assessment of library staff would occur during chat reference training, through the use of homework questions and surveys; and should be an ongoing process.

Producing & Implementing the Training Program

There were two main issues to consider in the planning for the production of the program. What type of training materials should be used? Second, how would the training be delivered? The implementation of the training program involved scheduling the sessions and training program assessment. One of the computer labs in the library was chosen to be the site of each program. The room was chosen because it allows each trainee access to a computer for “hands-on” experience.

A training manual was created and distributed to all participating employees. The training manual contains a description of the chat reference service, policies and procedures, list of chat reference competencies and goals, and a program schedule. In addition, the manual included detailed training information for the three sessions, including software, Windows and research training and chat reference transaction training. In addition, there were tip sheets for Windows, the chat reference interview and basic chat etiquette.

As stated previous, the training program was organized into three separate sessions.

Software Training

The first session involved *QuestionPoint* software training. The software training program was scheduled for June, two months before the official start of the chat reference service. The session was scheduled at this time due to the fact the software trainer was not available any other time and it would allow library staff time to get used to the software. The UNLV Libraries paid Amigos Library Services to send a trainer for a four hour session. The decision to bring in a trainer from Amigos was based on the fact that

the virtual reference committee did not have the time or the technological ability to conduct an “in-house” software training session. Training materials for the software training session were provided by Amigos. The software training session was an actual “hands-on” session for seventeen library staff. At the end of the session, library staff were paired together and had informal reference transactions with one person acting as the patron and the other as the library staff member. Library staff were encouraged to pair up and have practice sessions on their own. Future software training sessions for new volunteers or new library staff members will be conducted in-house by a library staff member, who has undergone training from either OCLC or Amigos.

Chat Reference Transaction Training

The chat reference training sessions were scheduled for the next two days following the software training. It was believed that these sessions should be conducted immediately after the software training so the staff could use skills learned in this session during their practice. Two training sessions for this section were scheduled due to conflicting schedule problems with library staff. The chat reference transaction training sessions were scheduled for an hour and a half. For the chat reference transaction training, the emphasis was on three concepts. First, we wanted to ease the transition for the library staff from a traditional to a digital environment. With any new technology, there will be some staff apprehension. Second, we wanted library staff to be comfortable with the switch to chat reference by illustrating similarities of traditional reference and chat reference. The goal was to build staff confidence by showing how traditional reference skills translate well to chat reference. Using their traditional reference skills as a knowledge base would help ease the transition to the digital environment. Last, we

wanted library staff to recognize and accept the fact that they would need to acquire and apply some new skills.

The chat reference transaction training session began with a discussion on the UNLV Libraries chat reference policies and procedures. In regards to policies, certain issues were discussed including licensing and copyright. Next, there was a focus on the synchronous environment and the chat reference interview. The similarities and differences between chat reference and traditional references were discussed. Concerning the reference interview, the training entailed an analysis of traditional reference versus online reference. Library staff were taught that chat reference required a combination of both traditional skills and new skills. As for similarities, the chat reference interview, like traditional reference interviews, still involves steps such as acknowledging the patron, assessing the patron's needs, assessing what the patron has already done, clarifying the inquiry with open and closed questions and a following-up. For the differences, the discussion focused on learning new skills such as typing, provide feedback on actions, written communication, and patience. To put the chat reference transaction in perspective, there was a comparison of chat reference to telephone reference. In both instances the parties are not visible to one another, thus lacking visual cues. To help with the reference interview, various chat tips were discussed including using brief messages, keeping the patron constantly informed of your actions, waiting for replies, etc. The training manual contained a list of chat techniques in the Appendix. The emphasis on the synchronous environment was that the transaction is more time consuming and both the patron and library staff learn new technology and software. There was also a discussion on patron behavior. The fact that patrons who use

chat services have a sense of urgency or immediacy was highlighted. The chat reference training also included a discussion on patron management techniques.

Techniques included:

1. **Refer patron to another mode of communication** – if the person is having difficulty with the chat software or has a very complex question, save time and effort by having patron contact the library by phone or email.
2. **Refer patron to another librarian or service point** – depending on the question, the patron may be better by having their inquiry answered by another service point or a specialist.
3. **If the question is time consuming, answer the question at a later time** – don't be afraid to ask the patron if you can get back to them with the answer. Offer to call or email with a response as soon as possible (try to use a time frame). Verify patron's contact information before ending the transaction.
4. **Save typing time** – use short sentences, but avoid one word replies. Make use of supplied scripts.
5. **Let the patron help you** – if the question is complex, have the patron assist you in the research. While you are searching, ask the patron to search resources you recommend.

The section on patron management also included dealing with difficult or rude patrons. Another part of the chat reference training dealt with the concept of chatting. Library staff were trained on proper chat etiquette. Tips for chatting and chat abbreviations were discussed. A list of chat tips and abbreviations were included in the Appendix of the training manual. Library staff were given old chat transcripts to learn more about the chat transaction. Finally, at the end of this session, library staff were divided into groups of two. One person played the role of the patron and the other played the role of the library staff member. After one transaction, the pair switched roles. Each "patron" was given a specific reference questions to ask. The list of questions to be asked by the "patron" was directly related to certain library skills. The questions dealt with finding a journal article, locating a Website and using the library catalog. At the end of the role playing, the group had a discussion on their experiences during the role play

and what they thought were their strengths and weaknesses. Before adjourning, there was an emphasis placed on applying the concepts and skills learned in the training program. To follow up, library staff were asked to pick a partner and practice their skills for one hour once a week.

Research Training

The research training sessions were conducted in July. The research training sessions were scheduled for one hour. For the research training session, the decision was made to focus on two types of resources: library databases and the Internet. These resources were selected based on the need for quick, efficient information. The virtual reference committee wanted staff to be proficient in using electronic resources. The Internet portion was conducted by the library's Internet Specialist and consisted of detailed instruction on *Google* and introduction to other directory sites. The database portion was conducted by several library subject specialists. A "core" list of databases was chosen by the virtual reference committee. The list of databases included *CINAHL*, *PubMed*, *Academic Search Elite*, *Academic Universe*, *ERIC* and *Literature Resource Center*. *Academic Search Elite* and *Academic Universe* were chosen because of their multidisciplinary nature. These databases could be used to answer questions for many disciplines. *CINAHL* and *PubMed* were chosen because the service will initially be offered only to students and faculty at the off-campus Dental School. *ERIC* and *Literature Resource Center* were chosen due to the fact that they cover specific disciplines that commonly use the library. The sessions included searching tips and short-cuts for the various databases. Handouts were provided for each database. The research training program was important because the UNLV Libraries does not currently have a staff training program. This allowed library staff to obtain training that was

important not only for the new chat service, but to their time serving on the reference desks. In addition to library resources, the research training also included a session on Windows. The Windows training covered basic navigation using keyboard commands and instruction on using multiple windows. The Windows section of the training program was conducted by a member of the UNLV Information Commons department. Assessment for this training session involved homework questions using the databases and Internet. Each presenter was asked to provide two questions for each participant to answer by a specified date.

Future Considerations

The training program at UNLV Libraries does not stop at this point. There will be an emphasis on assessment and ongoing training. In order to further assess the training program, participating library staff will receive an additional survey that will be distributed several months after the start of the chat reference service. The survey will ask questions in regards to the relevancy and applicability of the training materials and training skills to real chat situations. The assessment will also allow identification of new areas for training. There will be a need for additional training once the enhanced version of *QuestionPoint* is implemented. The enhanced version deals with several new technological advances, including co-browsing, video and audio streaming.

Conclusion

The literature shows that a chat reference training program is important to the success and quality of a chat reference service. The training program is a time

consuming project that requires careful planning. Several key components should be addressed including organization, implementation and assessment. Careful consideration should be given to identification and achievement of specific goals, preparation of training materials, delivery and teaching. Additionally, the program needs to include some type of assessment or evaluation.

When creating a training program, each library needs to analyze and evaluate their unique position. Although there is a thread of common skills identified with chat reference, the training needs from library to library will be different. Differences in the level of service offered, personality of the library staff and library resources available will affect the type of training program that should be implemented.

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Table I. Self-Training Exercises

| Answer | Number of Responses | Response Ratio |
|---------------------------------------------------|----------------------------|-----------------------|
| Read Articles | 14 | 86% |
| Spoke with other librarians | 13 | 81% |
| Visited other chat sites | 8 | 50% |
| Approached chat like traditional reference | 15 | 94% |
| None | 0 | 0% |
