

10-14-2005

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Repository Citation

Del Bosque, D. C., Chapman, K. (2005). Building skills F2F – Using chat reference techniques. *Brick and Click Libraries: An Academic Library Symposium* 24-31. Northwest Missouri State University.
https://digitalscholarship.unlv.edu/lib_articles/53

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Building Skills F2F - Using Chat Reference Techniques!

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Abstract

The UTSA Library, like many organizations, has been experiencing a period of rapid growth and change. Even positive change can cause stress in departments, and one way to help employees deal with change, while still providing customer-oriented service, is to establish a regular forum for discussion that encourages departmental communication.

Training is an important aspect of employee development; however, the literature indicates that, in many organizations, training is often given little attention and relegated to the sidelines due to other demands on staff. With the hiring of new personnel, including a new Head of Reference and a Training Coordinator, the UTSA Library's weekly meetings model was expanded to include more systematic training, including special events such as summer workshops.

UTSA librarians provided training in-house, worked with vendors, and collaborated with librarians at other institutions to provide a variety of training sessions to Reference staff. This paper illustrates the training process by providing an overview of training offered to the UTSA Library Reference staff. To compare their training program with those at other libraries, UTSA librarians surveyed other academic libraries in the San Antonio area to determine what types of ongoing training were incorporated into their Reference departments. This paper concludes with recommendations for the future of the UTSA Library's Reference training program.

Introduction

The University of Texas at San Antonio (UTSA), founded in 1969, is the second largest academic component in the University of Texas System. UTSA has an enrollment of over 26,000 students, and offers 109 degree programs. The university has the goal of becoming a doctoral/research intensive institution (<http://www.utsa.edu/About/>). The University is experiencing rapid growth, moving from 19,330 FTE (Fall 2003) to 22,626 FTE (Fall 2004), as indicated by enrollment statistics at <http://utsa.edu/registrar/enrollment.cfm>. While the final enrollment numbers are not yet available, all indicators point to significant increases in student enrollment for the Fall 2005 semester.

The UTSA Library consists of three locations: the John Peace Library at the 1604 (Main) Campus, the Downtown Library, and the Archives at the Institute of Texan Cultures. The library's collection includes over 650,000 books, 2,500 periodical subscriptions, and over 30,000 electronic periodical subscriptions (<http://lib.utsa.edu/About>).

The UTSA Library Reference Department is distributed among two locations about fifteen miles apart: the John Peace Library (JPL) and the Downtown Library. The Reference Department is comprised of twelve professional librarians, nine paraprofessionals, one administrative assistant and a part-time work-study student. In addition to averaging 25-30% of their time on the Reference Desk, Reference librarians are bibliographers, and also teach library skills classes in their subject areas, as well as general information literacy classes.

Reference services are provided at physical reference desks at both the JPL and Downtown Libraries, as well as over the phone and via email. Additionally, the UTSA Library participates in the collaborative Ask a UT System Librarian chat service, which is staffed five hours a week by UTSA librarians.

The UTSA Library, like the rest of the university, has been affected by the rapid growth of the exploding student population. As the student body expanded, staff had to adjust to the increased demands for additional hours, materials, and assistance. Changes in library administration, and changes in services, policies, and available resources, have an impact on library staff, as have an increased need for additional space and staff. While the Reference department is now fully staffed, the Library is experiencing significant changes at the administrative level; for example, two Department Head positions are vacant, two Assistant Dean positions are vacant, and the Dean of Libraries was recently reassigned as the Special Advisor to the Provost for Library Affairs, leaving a university administrator as Interim Dean of Libraries. While some of these changes were expected more than others, even positive change can cause stress in departments. During this time of transition, one goal of the Reference Department has been to help employees deal with change, while still providing good customer service.

The UTSA Library Reference Department has a long-standing tradition of weekly meetings that incorporate staff discussion of policies, procedures, and other relevant issues, and offer a training component when possible. In recent times, this forum has been used to encourage departmental communication and work through resistance to change.

With the hiring of new personnel, including a new Head of Reference and a Training Coordinator, the Reference Department's weekly meetings model was expanded to include more systematic training opportunities.

Reference Department Training: An Overview

This paper focuses on a particular training example, using chat reference techniques, to build F2F (face-to-face) reference skills. While this paper will describe this training example, it is useful to understand this training activity in the context of the UTSA Library Reference department's overall training program.

Reference department training activities are divided into broad areas such as Policy and Procedures, Database Skills, Customer Service, and Safety/Staff Development. The Reference department has regularly scheduled weekly meetings. Training activities are included in these meetings two to three times per month.

Table 1
Sample of Training Activities since January 2005

Anti-Spam Training	Using Webmail
Reference Performance Standards Review	Reference Interview Skills Review
Academic Search Premier Review	ProQuest Review
News Databases at the Library	CPR Training
CCH Database	Academic Universe: Lexis for Paralegals

Source: Chapman, Kimberly. Training Activities 2005. U of Texas at San Antonio Library Reference Department. Unpublished training files, 2005.

In summer 2005, the Reference department offered an experimental Summer Training Workshop Program to staff over a seven-week period in July and August. There were two main goals of the workshops: to provide training sessions to refresh reference skills and learn new skills, and to provide opportunities for Reference staff from both campuses to interact with each other. To ensure that different staff had opportunities to interact, we offered workshops at both campuses, and required that all staff had to attend at least one session at each campus. All employees were also required to attend a certain number of sessions – the number required varied depending on whether or not the employee had been with the department less than six months, was a librarian, or was a paraprofessional. Additionally, staff members who taught workshops were given “credit” towards their attendance totals.

UTSA librarians provided training in-house, worked with vendors, used other University resources and collaborated with librarians at other institutions to provide a variety of training sessions to Reference staff. Librarians took advantage of one another’s expertise, and incorporated ideas from other training models into reference training sessions.

A total of 25 sessions were offered to staff. Reference staff members were required to attend four mandatory sessions, and then were allowed to select from 21 remaining sessions to meet their attendance requirements. While most of the summer workshops were database/resource – oriented, a few workshops dealt with policies, procedures, and staff development. Additionally, other departments were invited to attend training sessions.

Table 2
 Summer Training Workshops (Mandatory Sessions Indicated with an Asterisk)

Policy & Procedures Review*	Back to School Refresher*
General Statistics Training*	Human Resources Workshops On Dealing with Change*
Building Architecture Search Skills	E-Journal Locator
Mergent Online	Back to Basics: Catalogs Review
Introduction to Health & Medicine Resources	Investext Plus
Acquisitions Process	Chat & Email Reference
Map Center 411	Library Tours (2)
Who's Afraid of CIS?	Google It!
Statistical Universe	Engineering Workshop
Thomson-Gale TexShare Databases	Compustat
Business & Company Resource Center	Literary Criticism
Spanish Resources	All About E-books

Source: Chapman, Kimberly. Training Activities 2005. U of Texas at San Antonio Library Reference Department. Unpublished training files, 2005.

Reference Department Training: The Role of Chat

The UTSA Library Reference department has participated in the Ask a UT System Librarian collaborative chat reference service since the Fall 2003 semester (Chapman and Del Bosque 55-56). The UTSA Library is responsible for staffing the service five hours per week, with Reference librarians volunteering to participate. Currently, four librarians staff the service on a regular schedule, with three experienced staff as back-ups if there are scheduling conflicts. Reference librarians have undergone periodic training on chat reference policies, procedures, and chat techniques.

Although librarians are capable of providing chat reference, the service is underused. During a time period from February 1st, 2005 to May 10th, 2005, the Ask a UT System Librarian service had 178 transactions, with UTSA librarians handling 39 of those transactions (Dobbs). However, chat provides a unique resource for training because transactions are logged and can be reviewed at a later date. These transactions can be used as source material to provide learning opportunities for both chat and other types of reference service.

The idea to review chat transcripts and apply them to broader reference training was inspired by a presentation at the 6th Annual VRD Conference in Cincinnati, Ohio. During the presentation *Show Me Yours and I'll Show You Mine! Implementing Peer Review*, Nancy Foley, Rita Kaiser, Jennifer Reichert, and Matthew Saxton demonstrated a process for participants to analyze chat transcripts for appropriate pieces of the reference interview, as a method to train employees on techniques for providing effective chat reference. This training model involves groups of about eight to ten participants who review chat transcripts together, with the assistance of a facilitator. Participants evaluate the transcripts looking for typical reference interview practices, such as

greetings, acknowledgment and clarification of the question, citing sources and providing instruction, and closing (Foley et al. 3-4).

There are significant differences between providing chat and F2F reference services, one of the most obvious being lack of nonverbal cues such as body language. However, despite these differences we decided to explore the possibilities of adapting this technique to F2F reference training at the UTSA Library. This technique can be used to help train new employees, and to provide refresher customer service skills to experienced reference staff. This year, we had a group of both new employees, and a regular training cohort, in which to “experiment” with these new training techniques.

First Things First: Getting Chat on the Reference Department Radar

UTSA librarians staff the collaborative chat service five hours per week, from their offices. Staffing chat is very much a “behind-the-scenes” activity compared to regular Reference desk staffing, where colleagues can see what you are doing. Even though chat reference has been marketed to students, and is mentioned periodically during departmental meetings, the adage “out of sight, out of mind” seemed to hold true – chat reference seemed peripheral to reference duties rather than being fully integrated. One of the workshops offered during the summer was a panel on *Visible and Invisible Reference Services*. This panel consisted of library staff who provided chat reference, and library staff who monitored the library’s email and comment services. The panel provided an opportunity for these staff members to share their strategies for assisting patrons in a virtual environment, showing how they bring their in-person reference skills to their chat and email responses. It also reminded Reference staff of the different kinds of library assistance provided to patrons, and laid the foundations for further training integrating both virtual and in-person reference skills.

Using Chat Transcripts with New Employees

The reference interview is a fundamental reference concept. Teaching the reference interview process and developing an employee’s active listening skills are an important part of the new employee training process. Typically, new reference department employees are assigned several activities to help them understand the reference interview:

- The employee must complete the Reference Interview module of the Ohio Reference Excellence (ORE) website at <http://www.olc.org/Ore/2intro.htm>. *ORE on the Web*, while public-library oriented, still provides a useful introduction to the reference interview process.
- The employee reviews the department’s Reference Performance Standards, which are based on RUSA guidelines.
- The Standards are discussed with the new employee, usually by the Training Coordinator, the Head of Reference, or the employee’s immediate supervisor.
- The Standards are periodically reinforced with PowerPoint presentations that emphasize key aspects of our standards of customer service.
- The new employee and the trainer role-play situations to practice the reference interview.

- The new employee watches experienced staff at the reference desk and is expected to learn through observation.

While these training processes have been successful in the past, primarily because the department has often hired employees with previous reference experience, this training can be inadequate for new employees who have little, if any, reference experience. Using chat transcripts to train new employees about the reference interview provides a risk-free environment for the employee to ask questions about the process and learn appropriate customer service skills, without having the pressure of a customer waiting for an answer. Additionally, some employees learn well through observing others interact, but events may happen so quickly at the Reference desk that it is difficult to analyze the details of the reference interview process. Chat transcripts can be used alone, or as a stepping-stone in the role-playing process.

Table 3
New Employee Training: Reference Interview with Transcripts

1	Provide employee with Reference Interview standards. This includes information about the Reference Interview process, including <i>Greeting, Paraphrasing/Active Listening, Asking Open Questions, Clarifying/Verifying, Getting Needed Information, Following Up, and Ending.</i>
2	Provide employee context comparing in-person and chat reference. This includes discussion of nonverbal cues in F2F transactions as compared with tone or word choice in chat reference transactions.
3	Provide pre-selected chat transcripts to the employee (having removed confidential patron information). Provide employee with a “reference interview” checklist to use with the transcripts.
4	Allow the employee to work independently and review the transcripts, looking for the “reference interview” elements. Allow the employee to decide if the transactions were good, or could use improvement, and to describe why.
5	The trainer, or a training team, reviews the transcripts with the employee, and provides feedback. The training team may emphasize points the employee may have missed, provide a different perspective for the employee, or may clarify points for the employee.
6	After the employee feels comfortable, the chat transcripts can be adapted into role-playing activities. For example, the trainer can ask, “How would you answer this in-person at the Reference Desk?” The trainer can address the issues of nonverbal cues, body language, and helping, approachable behavior.

Source: Chapman, Kimberly and Darcy Del Bosque. New Employee Training Activity: Exploring the Reference Interview. U of Texas at San Antonio Library Reference Department. Unpublished training files, 2005.

Other tools that can be incorporated into this training include librarians’ responses to email questions, as well as responses used on the library comment boards. Using transcripts, emails, or comments that already exist is a time-saver; additionally these materials have credibility because they are real-life examples that actually happened. While role-playing usually occurs from real-life examples, it can be time-consuming to document these scenarios. The transcripts allow a

new employee to work through the reference process at an individual pace, looking at each piece of the reference interview process, and teaches them appropriate models of customer service. It provides context and a supportive environment to learn necessary skills, prior to “jumping in” at the Reference Desk. The Reference Department is currently incorporating this training method into new employee training, and will be evaluating the effectiveness of the training.

Using Chat Transcripts in Refresher Training Sessions

Reference interview skills are periodically reviewed with all staff as part of refresher training sessions. The role-playing technique is often used during staff training sessions, and the reference interview lends itself to this method of training. One of the drawbacks of role-playing is that it is a group activity, and sometimes employees need an opportunity to review materials on their own. Additionally, similar to real transactions at the Reference Desk, there can be so much happening during the role-playing session that analyzing all the pieces of the reference interview can be a challenge. (e.g. Did the staff member use appropriate body language? Did the staff member ask open or closed questions?)

Incorporating chat transcripts into reference skills review provides an opportunity for employees to either review material independently, or work together in groups, depending on the situation. This helps accommodate different learning styles: some staff are visual and can connect with the role-playing process, while others like to have everything “written down” and have time to think about it. Reviewing chat transcripts can be a separate activity, or be incorporated with a role-playing activity, depending on training objectives. As with training for new employees, the steps in the process are the same. Asking employees to analyze transcripts allows them to take advantage of their expertise and experience, which can lead to productive staff discussions. The trainer may facilitate the discussion, while keeping the focus on staff participation. We have just begun implementing these training methods with our staff, and are optimistic about their effectiveness. We plan to obtain feedback from staff about the process, and will share that information when it is available.

Evaluating Training - How Are We Doing?

The Reference department needs to evaluate training for two reasons: we want to know if our training is similar to training at other institutions, to learn how we can improve, and we want to know if our training is actually effective for our employees – is the training meeting objectives? Are employees applying what they’ve learned? To compare our training program with those at other libraries, librarians at UTSA are in the process of surveying other academic libraries in the San Antonio area to determine what types of ongoing training are incorporated into their Reference departments. In addition, the Reference Training Coordinator is surveying UTSA library reference staff to learn their attitudes about training opportunities they currently receive. Data is still being gathered regarding the Summer Training Workshops that were offered; this feedback will be important in determining if training is meeting the needs of the department and in fostering better communication among Reference staff. UTSA Library’s experiments with training will provide us with recommendations for the future of our Reference training program that could be useful in many library situations.

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