

Quality Assurance in a Multi-state, Multi-national Virtual Reference Cooperative

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Abstract Cooperative virtual reference services allow libraries to expand their reference services beyond their four walls as well as beyond their normal operating hours. QuestionPoint's 24/7 Reference Cooperative ("the Cooperative") includes 1,400 libraries in the United States and the United Kingdom. Libraries participating in the consortium are able to provide their users with reference assistance from a librarian 24 hours a day, 7 days a week, 365 days a year.

Ensuring high levels of quality in any reference service is paramount, yet it is challenging to provide a consistently high level of service with such a multitude of librarians offering service in a large reference cooperative. The development of cooperative policies and procedures is imperative in a cooperative service environment. The ease with which service quality can be evaluated based on examination of virtual reference transcripts allows the development and implementation of quality assurance policies, procedures and best practices. The Cooperative procedures and practices are discussed. Recommendations for providing quality cooperative reference service based on examples of "successful" QP sessions with exemplar transcripts are provided. Transcripts of "unsuccessful" sessions are evaluated with recommendations on how they could have been answered to provide a more "successful" experience for both librarian and user.

Key words: Quality Control; Chat Reference; Cooperative Virtual Reference Service; QuestionPoint; Transcript Analysis

1.0. Introduction

By the late 1990s, many library services were available on the web. Web-based catalogs, databases and other library resources and information were provided on most library web sites by 1998. While many libraries offered email reference from their web site (Coffman & McGlamery, 2000), very few offered the same interactive personal reference service via the web site that could be obtained face-to-face (FtF) at the library or via the telephone. These first web-based reference services only were available when the library was open, which was not the case for other library web resources. A person could go to the library's web site at 2 AM, search for information in the catalog and databases, but would not be able to get help from a librarian until the library opened.

This type of service did not meet the expectations or needs of the libraries' users since they were accustomed to 24/7 service in the Internet environment. Users' familiarity with live chat web-based customer service offered by large retailers and banks also influenced their information-seeking expectations (Coffman & McGlamery, 2000). Using the live chat web-based customer service model, the 24/7 Reference Cooperative in Los Angeles was developed for libraries in 1998. Unlike the call center model, the Cooperative model proposed that librarians could staff the virtual reference desk collectively, answering any questions that were asked during a shift and was designed to enable libraries to offer help to their users whenever they needed help, whether the physical library was opened or not; therefore, a librarian at Santa Monica Public Library would assist users from any of the participating libraries during a shift. As the Cooperative grew, the Santa Monica librarian may answer questions from users located in other cities within California or in other states, such as Maryland or Massachusetts.

By staffing cooperatively, the Cooperative virtual reference service (VRS) was able to grow at a sustainable pace. The service went live in July 2000 when Santa Monica Public Library put a link to the service on their library web site. The service was staffed by Santa Monica public librarians and contract librarians hired through an LSTA grant provided by the State of California, and live chat was initially available Monday through Friday, noon to 6 PM. Within a month Santa Monica was joined by two other Southern California libraries (Buena Park Library District and Los Angeles Public Library), and in a year's time, the service had grown to include more than fifty libraries, including several in Massachusetts, and was available 24/7.

The 24/7 Reference Cooperative was acquired by OCLC in August 2004 and merged with OCLC's virtual reference service, QuestionPoint. The 24/7 Reference Cooperative is a subset of the QuestionPoint community. More than 2,000 libraries in 23 countries subscribe to QuestionPoint. As of spring 2008 the 24/7 Reference Cooperative service had approximately 1,400 participating libraries (more than 1,000 are public libraries and about 350 are academic libraries) throughout the United States and the United Kingdom (UK) with approximately 10,000 VRS librarians. With a cooperative of this size and complexity, key management policies and procedures must be adopted to ensure a coherent service. Scheduling staff to adequately provide 24 hour-service and assuring the quality of the service are critical components. With thousands of librarians answering questions from thousands of different libraries, quality assurance for the Cooperative can be challenging for both the librarian answering the questions and the librarian whose users are asking the questions. The VRS librarians may be answering questions for users who are located in other countries or familiar with other libraries; therefore the librarians may not be familiar with library collections or resource access policies. It also can be difficult for the librarians whose users are working with librarians from other countries and libraries. These librarians review the VRS transcripts to evaluate whether the users are receiving the quality service they would in their home library.

For the Cooperative to succeed, librarians must feel confident that quality service is being offered to their patrons, regardless of which VRS librarian handles a question. The VRS librarians also must aware of and comply with the Cooperative's expectations for the quality of the service. This requires clear guidelines, adequate training, and continuous reinforcement.

2.0. 24/7 Reference Cooperative VRS Policies

From its inception, the Cooperative service was governed by written policies and procedures. The 24/7 Reference Cooperative Policies contain the Cooperative mission statement, scope of service, and performance standards (QuestionPoint, Policies and Procedures). These

standards are prescriptive and illustrated with suggested behaviors. To supplement the Policies, the Best Practices present a distillation of the Policies, focusing specifically on guidelines pertinent to VRS librarians during sessions with non-local (ie, Cooperative) users (QuestionPoint, Best Practices). Collectively, these two documents are known as "the Policies."

The Policies are in a wiki format, for easy updating. The Cooperative manager is responsible for promulgating and enforcing the Policies and is assisted by an Advisory Board of Cooperative members. The Advisory Board meets with the Cooperative manager on a monthly basis to review existing policies and to suggest revisions; therefore, the Policies are fluid in order to be responsive to issues that arise within the Cooperative.

The Policies may be characterized as either technical or qualitative in nature. Technical policies pertain to the operation of the QuestionPoint VRS software (the Cooperative uses OCLC's QuestionPoint software), such as the use of the appropriate resolution code, the method for reporting quality concerns, the procedure to transfer a session to another librarian, and other related technical issues. Qualitative policies relate to customer service issues and are of two types: communication skills and reference librarian skills.

The Policies include information on the development of communication skills in the virtual environment and provide suggestions for greeting patrons (e.g., "Send a personal greeting, identifying yourself and indicating your willingness to help. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron.") and guidelines for how to interact with virtual users (e.g., "Chat frequently, so patron doesn't have long lags without chat from librarian (no more than 3 minutes should elapse without the librarian sending a message to each patron who is in session, even if it is a simple 'I'm still working on your question', or even 'Still searching'...")

In the area of reference librarianship, the Policies of necessity are less concrete. For example, the Policies state, "Choose resources at the appropriate level for the patron's research. In general, databases are preferable to Google or other general web sources when assisting students with research projects." This was demonstrated in a QuestionPoint session when a VRS librarian communicated to the user, "[W]ell I found an excellent link on the google page... you can put into google's search bar: Mesopotamia +government and look at the links they provide..." to which the user responded, "I have already searched there and that really doesn't help me" (Radford & Connaway, 2005, chat transcript QP-44). Similarly, the Policies state: "Recommend appropriate search terms and subject headings, in the context of a recommended search statement." The Policies do not go into detail regarding the process that a reference librarian would typically employ to ascertain appropriate search terms.

Once the Policies are established the Cooperative VRS librarians must be informed of the existence and content of these Policies. All participating VRS librarians attend a mandatory two-hour training session focused on the Policies in addition to the QuestionPoint software training. The training is designed to familiarize the VRS librarians with the Policies and the rationale behind them and to provide a forum for their questions. Two-hour refresher trainings also are held quarterly.

The Policies also are available from the main QuestionPoint.org website with the other documentation and support materials for QuestionPoint and are updated as needed. In addition,

once Cooperative librarians log into the QuestionPoint software, there is a section inside the "My QuestionPoint" interface containing links to the Policies as well as other Cooperative resources.

To reinforce the Policies, a Quality Tip is posted every week in the QuestionPoint blog (QuestionPoint, QuestionPoint [blog]). The Tip usually contains a quality tip then illustrates it with an anonymized session. Common topics for tips include how to deal with homework questions, best practices when handling non-local patrons, and search strategies to use with various information requests.

Although the Cooperative librarians should be familiar with the Policies, this in itself does not ensure a quality service. A VRS librarian may forget or be unaware of the Policies, or a situation may arise that is not covered specifically by the Policies. For these reasons, a Quality Control process was implemented early in the life of the service. This process allows any supervisor at any participating Cooperative library the ability to refer a session transcript to the Quality Control team. Thus, anytime a library is concerned about the quality of a session done for one of their users by a Cooperative librarian (i.e., a librarian not from the user's library), then the reviewing librarian can refer the session to the Quality Control team. This team reviews all sessions referred to it by comparing the session referred to the Policies. If necessary, a Quality Control team member will correspond with the chatting librarian to discuss the session. This process is possible because each participating library is able to review all sessions with its users, whether handled by the local librarian or by a Cooperative librarian.

Part of the success of the quality control process depends on each supervising librarian reviewing the users' transcripts, and reporting any issues to the Quality Control team. In calendar year 2007, approximately 1,200 sessions out of a total 349,796 Cooperative sessions were referred to Quality (approximately 0.34% of all sessions). Since librarians are also encouraged to send compliments for good service to the VRS librarian not all of the sessions reported to Quality are complaints or concerns. Many of the 1,200 sessions referred illustrated positive librarian techniques and were not problematic.

Based on both the Policies and quality control process and research conducted by Radford & Connaway (2005) to evaluate VRS from the perspective of VRS librarians, VRS users, and non-users of VRS, recommendations for cooperative VRS have been developed. The recommendations are identified and supplemented with examples of exemplar transcripts of "successful" QuestionPoint sessions. Some examples of transcripts of "unsuccessful" sessions have been evaluated and include recommendations on how they could have been answered to provide a more "successful" experience for both librarian and user.

3.0. Recommendations for Cooperative VRS

3.1. Dazzle 'em (from a distance)

The mission of the Cooperative is "to provide high-quality information to the communities served by the cooperative network of member libraries (the "Members") in the most efficient manner possible" (QuestionPoint, Mission). The Cooperative is based on the assumption that librarians working together from the same policies can provide good service to any online user of any of the member libraries, even if the librarians are situated in different library systems that are otherwise completely unrelated.

One of the strengths of the Cooperative is the range of participating libraries, located throughout the United States and UK. The diversity of geography allows libraries in California to cover chat sessions from UK users long after the UK librarians have left their desks. The potential downside is the VRS librarian is not from the user's library – or even from the user's country. The cooperative nature of the staffing means that the chances of a user connecting to one of his or her own local librarians can be quite small, depending on the number of hours of staffing the local library is able to provide. Therefore, many users will go to their own library website, but be helped by a librarian with no connection to that user's library.

The Policies state: "Patrons use the service in order to get high quality information advice from a qualified information professional." The same general principles that apply in traditional reference apply when providing reference service in the Cooperative. Librarians staffing the service should be approachable, demonstrate interest in the patron's question, practice reference interview techniques, and demonstrate effective searching techniques... As in traditional reference, it is important for the librarian to be approachable to patrons: make the patron feel welcome and place them at ease" (QuestionPoint, Performance Standards).

One of the most crucial times in a session is at the beginning, when the librarian picks up the user. It is crucial for the librarian to advertize the cooperation of the libraries and librarians without overwhelming the user. The Policies encourage the VRS librarians to: "Send a personal greeting, identifying yourself and indicating your willingness to help. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron." Several suggested greetings are provided in the Policies (QuestionPoint, Greet).

"Hello, my name is Mark, and I'm a reference librarian at xxx University. Your library and my library are part of a nationwide cooperative that staffs this chat service. I'm looking at your question right now."

OR

"Hi! Your call has been picked up by a librarian at the xxx service in {name of state}. Your library and my library are part of a nationwide group that provide backup for each other's service. I'm reading over your question and will be with you in just a moment."

The VRS librarians are encouraged to promote both a global and local presence. At the same time, if the user can then see that a librarian from Hawaii, or Germany, can answer their policy question well in cooperation with other librarians in a global service, they could be doubly impressed. In a telephone interview, one VRS librarian stated, "I think [VRS] is going to kind of contribute to the whole globalization that the Internet is doing; it's going to make it possible for anyone, anywhere to ask a librarian a question - a question of any librarian or any information person anywhere. It may even contribute to more informed information-seeking behavior." (Interview L-034)

The suggested greetings are designed to encourage the user to feel comfortable in asking a question, while also providing information regarding the librarian's location. It is a perfect opportunity for VRS librarians to use the same interpersonal techniques to connect globally to an individual patron who remains local and to build rapport with the user in a virtual environment. This may be more evident from the user's perspective than the librarian's

perspective. One user from the Midwestern United States who was seeking information from a librarian on the Eastern coast of the United States asked, "How is the weather in Boston?" when the user realized the librarian was located thousands of miles away (Radford & Connaway, 2005, chat transcript QP-108).

Optimizing on the globalization of VRS will help to establish the users' expectations as well as provide a possible basis for a good interaction. This is exemplified in a QuestionPoint transcript when the user realized that the VRS librarian was located in San Francisco. The user asked, "R U in San Fran?" The librarian replied, "I am - I work at the San Francisco Public Library." To which the user replied, "U R so.... lucky. That is my favorite city in the world !! Have a great weekend.... Wish I was there!!!" (Radford & Connaway, 2005, chat transcript QP-108)

3.2. Overcome Boundaries and Heighten Awareness of Remote Access Issues

Cooperative VRS librarians are instructed to assist users with resources at their own library rather than resources at the VRS librarian's library. A user in Maryland will not find it helpful if a California librarian provides information during the session from databases the user will not have access to once the session is over.

The QuestionPoint software captures the identifier of the library where the user accessed the service and programmatically matches this with the policy page that each library completes upon joining the Cooperative. When a library joins the Cooperative, that library is required to complete a web-based policy page containing links to the library's resources and databases, as well as local policies (renewals, fees, etc). This policy page is served to the librarian interface whenever a VRS librarian assists any user that accessed the service from that library's website.

Librarians should not just send links to web pages, but rather provide context and instruction to the user. Enough guidance should be provided so that the user can recreate the search if needed. The VRS librarian should include the name of links, which the user should click on, as well as the "click path." Merely providing links to resources often will not suffice since some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links and some databases will not be available to the user.

In both online surveys and telephone interviews, VRS librarians expressed the difficulty of determining what databases and full-text resources a user is able to access in a remote virtual environment (Radford & Connaway, 2005). The librarian may need to guide users beyond the consortial limits. In a telephone interview, one librarian discussed some challenges associated with the Consortial service and stated, "Sometimes, if it's in a database or something, it's because I don't have access to what everyone else has. I'll say, 'You need to go to this site and do things and search within it,' and then let them do it. There are limitations within the consortial relationship about what I can do with those people." (Radford & Connaway, 2005, interview L-070). If a librarian takes on an involved task to identify a database or resource and then says, "Here's your answer, but you can't see it right now," it embarrasses the service (and perhaps, in turn, the local librarians) (Connaway & Radford, 2008a).

Another librarian communicated with the user in the following manner, "I see your issue, but there are only citations. I think the publisher has messed us up and not included your article in any of the full-text options. ..." This librarian continued, "we can subscribe to all the databases in the world, but if the publisher doesn't let them have the articles, we're stuck" (Radford &

Connaway, 2005, chat transcript TS-199). This situation could have ended successfully if the librarian provided links to databases and resources that were accessible to the user or guided the user to a local library that would provide access to the databases and resources.

3.3. Develop and Share Expectations

It is crucial that all participants in the co-operative service have a shared vision for what the service offers and for determining quality. Quality has a dual dimension and is defined by accuracy in answering questions or providing guidance in searching for information as well as by building strong interpersonal rapport with virtual users. Members of the Cooperative must agree on how much help will be given (aim for generosity within staff/time limits), how much instruction will be given, etc. so that a consistently high level of service is developed and consistently offered to users. All users (children, young adults, even rude or impatient people) should be responded to with high levels of professionalism.

Librarians should show professional courtesy and respect when answering questions. The Policies state: "Maintain objectivity and do not interject value judgments about the subject matter or the nature of the question into the transaction."

The reference interview (or, as it could more accurately be called, the reference conversation) is the key element in developing user expectations and is crucial to the success of the session. The librarian must be effective in identifying the patron's information needs and must do so in a manner that keeps patrons at ease. Strong listening and questioning skills are necessary for a positive interaction.

The reference interview process helps the librarian determine what the user is seeking, and allows the librarian to tell the user what can be done during the online session and what may need to be sent for follow up.

In online chat, there is a tendency to skip the reference interview. After all, the user has typed in a question, and the natural inclination of the librarian is to answer it. Librarians should always ask at least one question, if only to repeat what the user just said (the user may have made a typographical error and may not in fact mean what he just typed). Librarians should not assume at the beginning that they already know what the user is talking about or the answer to the question.

The Policies state: "Conduct an adequate reference interview to understand the question and the patron's information need. Be sure to clarify the patron's question before beginning the search." Question clarification could more accurately be described as question negotiation and involves several steps:

(1) The librarian must determine what the user needs. This may not be straightforward; a user may not be clear himself what is needed (it may be for a school assignment that the user is unclear about), or the user may have a definite idea of what he needs, but is unable to articulate this need in a way the librarian can understand.

(2) Once the need is understood, the librarian next must determine if the need can be met. Librarians in virtual reference sessions may not be able to satisfy a user request for several reasons:

- (i) The librarian does not have access to the information that would satisfy the need (ie, a non-local librarian may not have access to a local database);
- (ii) The librarian may not know where to find the information;
- (iii) The librarian may not have the time to provide a complete answer;
- (iv) The information does not exist.

For (i), (ii) or (iii) above, the VRS librarian can refer the question to another librarian, for follow up. Referral can be done live (librarian #1 transfers a live session to librarian #2, while the user is still online) or post-session. Post-session referral is by far the most common way to deal with (i), (ii) and (iii), and an entire section of the Policies is devoted to both the rationale and the mechanics of Follow Up.

The following example of a successful VRS experience that resulted from a transfer from VRS librarian #1 to VRS librarian #2 demonstrates the power of the Cooperative (Radford & Connaway, 2005, chat transcript TS-106).

U I'm doing a research paper on the pay for teacher's compared with that of professional athletes. I'm trying to find some sources, but i'm having trouble finding any reliable sources. Help!

L [A librarian will be with you in about a minute.]

L [24/7 Librarian [Name]- A librarian has joined the session]

L Hello! This is the reference librarian. There are at least three people ahead of you in line. If you would prefer not to wait, you can receive a response by email if you type in the following information: 1) your email address, 2) your deadline, and 3) as many details as you can provide about your topic.

U i can wait. i'll just do some searching while i wait. thanks

L [Patron Name], another librarian is free now, thank you for your patience, I'll transfer you now

L [24/7 Librarian [Name] - You have been conferenced with [Name] Librarian [Librarian2 Initials].]

L [Name] - A librarian has joined the session]

L Hi [Patron Name], I will be right with you.

The next example illustrates an unsuccessful VRS experience where the VRS librarian did not attempt to answer the question or refer the question to another librarian, but referred the user to an anonymous school guidance counselor ended abruptly with the user disconnecting from the service (Radford & Connaway, 2005, chat transcript QP-21).

U Chat Transcript: I need to know what job I can get when I graduate with an Associate degree in Criminal Justice.

L [A librarian will be with you in about a minute.]

L [BLC-[Librarian Name]-BrandeisUniversity - A librarian has joined the session]

L [Hello, this is the reference librarian. I'm reading your question...]

L **I would suggest you speak with your career guidance office.**

U **okay**
L **Is there anything else i can help you wtih**
L [[Patron Name] - has disconnected]

While there are certainly wrong answers provided by librarians on occasion, the most common reason for an inaccurate answer is that the librarian is not answering the question the user asked. A good reference conversation and question negotiation usually ensures that the librarian and user are on the same page. This reference conversation does not only occur at the beginning of a session; once the request is agreed upon by the librarian and user, and the librarian determines which resources to send to answer the request, the librarian should then help the user evaluate the sources sent for relevancy to the topic. Librarians should also be sure to ask for feedback on the resources sent, in order to determine whether additional information is needed.

Another reason for inaccuracy is time pressure. Several chatting librarians feel that an immediate response must be provided to the online user, even for more complex requests. The user may contribute to this feeling by saying "hurry up," or other similar statements. In addition, if it is a busy time, some librarians may be handling more than one session at a time, and this can lead to more inaccuracies. When the librarian sets expectations with the user (as discussed above), those requests needing additional time can be sent to Follow Up, thus resulting in increased accuracy.

The Policies state, "The librarian is responsible for determining if the patron is satisfied with the results of the search, and is also responsible for referring the patron to other sources, even when those sources are not available in the local library. Questions which are not readily answered with quality resources during the online session should be coded for Follow Up... Questions that cannot be fully answered during the live online session should be answered by a librarian at the patron's library."

The Policies also contain other guidelines regarding the reference interview and the importance of clarifying the question:

- Ask "open ended" questions.

When patrons ask general questions, you need to find out specifically what it is that they are looking for. The most efficient and effective way to do that is to begin by asking open ended questions. Those are questions that can't be answered by a "yes" or a "no." The basic point to remember is that you want patrons to tell you in their own words what it is they want. You want to avoid putting words in their mouths.

Examples:

What kind of information on ___ are you looking for?
Would you tell me more about ___?
Is there something specific about ___ that you would like to know?
What would you like to know about ___?
Can you give me an example?

- Clarify any confusing terminology and avoid excessive jargon.
- Verify the search request BEFORE doing any searching. Re-phrase the question and ask the user to confirm that that is what they are looking for.
- Find out where they've already searched.
- Especially in the virtual environment, it's best not to waste time redoing an easy search if the user has already done so. But don't assume that a standard source is eliminated just because a user has consulted it--the librarian's professional experience may be needed to find the information in that source. Also, finding out where the user has searched (if at all) gives the librarian an understanding of the level of the question.
- Find out as much as you can about user needs the information -- is it general interest or for a school report? This affects the type of information the librarian will provide.

In a sample of 141 QuestionPoint correctly answered questions Radford and Connaway (2008b) identified eighty-four questions (60%) that were clarified and answered correctly and forty-seven questions (33%) that had some type of follow-up and were answered correctly. 47 = 33% (n=141).

3.4. Exceed Expectations – Aim for Excellent Service & Cultivate Repeat Users

Many users are new to the idea of a co-operative service and need to be shown what the service can do. They will come back and spread the word to others when they have a positive experience. It seems almost trivial to say, but the first step to providing quality *cooperative* service is to provide quality service. In a telephone interview a librarian stated, "Usually the students say, 'Oh, this is exactly what I need,' or 'That's it!' or 'Thank you so much.' They seem so impressed! [laughter] And they're so grateful, and they think it's really hard work! [giggle] And you see them all this time, and they are just very, very appreciative students. You get lots of chat shorthand, like 'ohmygod, that was great.' [giggle] Lots of omg's. [laughter]" (Radford & Connaway, 2005, Interview L-042).

Librarians who provide valuable information in a friendly and approachable way invariably earn the gratitude of their users. This is the key value that a virtual reference service can provide to busy users - personal interaction with a knowledgeable information guide. Ideally, several minutes spent with a capable reference librarian will save many users countless hours spent searching the Internet using Google or other search engines.

When a VRS librarian successfully helped a sixth grade student find information on a difficult subject for a science class the student praised the librarian and the service. The transcript detailing the final conversation between the user and librarian follows (Radford & Connaway, 2005, chat transcript QP-511).

U **[Librarian Name]-thank you so much!!!**
L **Is that enough information to get started?**
U **Yes, that is great. I really appreciate your time and help-this is a great service. Thanks again and have a great night.**
L **Great!**
L You are welcome and have a good evening too
L If you need additional assistance, please log back into the service

Since it is much easier for a user to search the Internet at their own convenience rather than interact with an online librarian, VRS should add as much value to the brief interaction as possible. The only way to be sure value is provided is to ask the user if the information given meets the need. The Policies state: "Before closing, ask the patron if the question has been answered ("Does this completely answer your question?") or if additional information is needed" (QuestionPoint, Concluding). Sending this message signals the librarian's interest in making sure the users gets the needed information, and tends to result in higher user satisfaction with the service.

If the user indicates that no additional information is needed, the VRS librarians should either send the scripted Goodbye message provided by the user's library ("Thanks for using Maryland AskUsNow!") or, if no Goodbye script is available, thank the users for using the service and encourage them to return if they have more questions. This not only reinforces the name of the service, but also helps to cultivate repeat users.

The following example from a QuestionPoint transcript (Radford & Connaway, 2005, chat transcript QP-476) exemplifies the positive reaction the user has about the service by the request to access the service again in the future. The librarian reiterates the name of the service and URL to encourage the user to access the service in the future and to reinforce the name of the service.

U well i am going now but if i need more help in the future, can i come back here again for help?

L You can also add some larger perspective, such as that quote from British historian Gary Sheffield: "The battle of the Somme was not a victory in itself, but without it the Entente would not have emerged victorious in 1918."

L This is another site with the same quote:
<http://www.iwm.org.uk/server/show/nav.00o003001>

L Yes, you can use this service anytime...

L Try the UK service, and if they are closed, ours will answer, 24/7...

U oh ok thank you so much for all your help, im sure that i will use this service next time as it has been so useful. can you just remind me of the name of this site again

L You're welcome and good luck!

L [I hope this is useful. Let us know if we can be of further assistance. L[Librarian Name] QuestionPoint 24/7 Librarian]

L The UK service is called Enquire...

L You can just search for that word and you will find it...

L <http://www.peoplesnetwork.gov.uk/>

L Librarian ended chat session.

3.5. Start off on the Right Foot

Communication is very important in online reference, since librarians lack the visual and audible cues inherent in FtF and telephone reference. The Policies encourage librarians to create a welcoming atmosphere and to chat frequently, so the user doesn't have long lags without chat from librarian. The Policies state that no more than three minutes should elapse without the librarian sending a message to each patron who is in session, even if it is a simple "I'm still working on your question", or even "Still searching...". By keeping the user informed of the process, a more collegial conversation will be created between the user and the librarian.

Librarians should strive to be as approachable as possible, to encourage good interaction with the user and create a welcoming atmosphere. This is also part of the Greeting policy: "Send a personal greeting, identifying yourself and indicating your willingness to help" (QuestionPoint, Greet).

It is important to establish rapport early in the chat. To discourage rude behavior all members of the Cooperative should aim for no more than one or two scripts to be pushed to the user before a personal greeting is exchanged. When users see scripts they think these are computer generated and are more likely to become impatient or rude. A VRS librarian reiterated this in a response to a question in the online survey by answering, "We introduced ourselves early in the conversation, which set a good tone for the rest of the chat" (Radford & Connaway, 2005, Librarian Online Survey 72562).

The Policies include other tips for approachability (QuestionPoint, Approachability).

- Communicate in a receptive, cordial, and encouraging manner. Demonstrate a high level of interest in the patron's question. This generates a higher level of satisfaction among users.
- Type like you talk, in a conversational manner. Clarify confusing terminology and avoid excessive jargon. Use terminology that is understandable to the patron.
- Use spelling, grammar and capitalization appropriately. Never type in capital letters - this has the effect of shouting at the patron.
- Use the client's name and ask them questions when appropriate.
- Show professional courtesy and respect when answering questions. Maintain objectivity and do not interject value judgments about subject matter or the nature of the question into the transaction.
- Avoid yes/no responses. Yes/no's can be interpreted as cold and unfriendly, just as in face-to-face reference.

During a thirty minute QuestionPoint chat session (Radford & Connaway, 2005, chat transcript QP-136) a user continually asked the librarian for a name. The librarian seemed to ignore the user's request but continued to answer the user's question and to push information to the user. The librarian ended the session without ever acknowledging the user's request for a name. The user did not request a full name, just a name and repeatedly made the request. Even though the user did get the information requested, the experience could have been more positive for the user if the librarian provided a name. It did not have to be the librarian's actual name, but could have been a "stage" name. The librarian missed an opportunity to appear more friendly and approachable.

In order to promote good rapport with the user, the librarian can reassure the user when the user may be intimidated by the format or technology, attempting to keep the user from feeling "judged by the librarian" and focusing on the user's information need. When a user apologized to the librarian for making a typo, the VRS librarian assured the user that typos were no problem by stating, "Don't worry about the typos - I make them too!" (Radford & Connaway, 2005, chat transcript QP-20).

Although it is easy and understandable to begin taking negative comments personally, if possible, take a moment to detach yourself from negative or frivolous chat interactions. Some

librarians use scripted messages to respond to such situations; others defuse them by offering to follow-up by email. In a telephone interview, one VRS librarian stated, "I just try to be as professional as possible—I try not to get caught up in people's negative feelings—I try to keep the interview positive and not let things get to me on an emotional level" (Radford & Connaway, 2005, Interview L-015).

Sometimes demonstrating a sense of humor can diffuse a potentially negative interaction. As one VRS librarian stated, "If they're rude, I might say something to that effect, I try not to respond in kind. I try to give them an opportunity to realize I'm a real person—I do think some people think they're chatting with a computer" (Radford & Connaway, 2005, Interview L-015).

3.6. Accentuate the Positive

Always seek to put the co-operative service in the best light. Let users know about what you CAN do to help them, avoid negative words like "can't" "don't" "but" etc. So instead of saying "I don't have access to this or that" say, "I can help you to identify, to search, to find, to get the power" etc. Think creatively, present options, and let the user decide what will satisfy them. Avoid worrying that you are giving too much help – be as generous as time and staffing constraints allow.

The Policies state: "Use positive phrasing ("We can..." instead of "We don't/ can't / won't..."). Librarians should "communicate in a receptive, cordial, and encouraging manner. Demonstrate a high level of interest in the patron's question. This generates a higher level of satisfaction among users."

Negative statements by librarians occasionally occur when users appear to be students who need help with their homework. Instead of saying "We cannot do homework for you," librarians should focus on what they can do for the student. This is a great opportunity to take advantage of this teachable moment by explaining how to navigate through a database or website, how to choose effective search terms, and how to evaluate a resource for authoritativeness and relevancy.

3.7. Provide a Variety of Resources, Citations & Referrals

3.7.1. Give User the Option to Go Beyond Initial Resources

Librarians should provide professional level search assistance – that is the value added by an online reference service. Many times librarians simply push web pages to the user, in order to answer a question. It is important to provide context and instruction to the user, rather than just sharing resources or merely sending web pages. Librarians should provide enough guidance so that the user can recreate the search if needed (include the name of links, which one the user should click on, as well as the "click path"). From a technical perspective, merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.

The Policies adopt an information literacy approach, stating that: "Librarians should construct a competent and complete search strategy. Select search terms that are most related to the request. Verify spelling and other possible factual errors. Identify sources appropriate to the patron's need. When searching for something, explain what sources you're consulting and what

terms you're using for a database query. An effective reference interaction should include the patron! When offering information that may answer the question, request feedback from the patron (i.e. Is this information helpful to you?). Work with the patron to narrow or broaden the search when too little or too much is found.”

3.7.2. Manage Complex or Multiple Queries

Researchers with complex questions or a student seeking answers to ten separate homework questions in the course of one chat session represent particular challenges to Cooperative librarians, particularly when the service is busy.

In the case of the student with a list of homework questions, librarians could first look for a common element (are all the questions about New Jersey flora and fauna?). If the student has several questions relating to a general topic or seems to need general resources about the topic, librarians can recommend an almanac or encyclopedia suitable for homework assignments. The librarian can ask the user which question is most important to answer first and continue doing so throughout the interaction. If the librarian needs to move on to the next user, say so and offer the user alternative ways to procure an answer, i.e. email, phone, etc.

For the complex query, the online chat interaction is invaluable for negotiating the query, determining what steps the researcher has already tried and what resources have already been found. However if the request is a tricky one, actually finding resources which meet the need may be done with more completeness and higher quality by the librarian offline, rather than during the chat. In other words, for many complex queries it serves the user best to follow up on the session via email or in-person reference appointment.

3.8. Continue Providing Information if Patron Disappears

Online users may disappear from a chat session for a variety of reasons: they have enough information so they simply close the session without informing the librarian; they are disconnected inadvertently; or they may be multi-tasking and simply not paying attention to the many messages of the chatting librarian. The software does indicate when the user has either closed the browser, hit the “end session” button, or been disconnected inadvertently. If the user left an email address, the librarian should continue providing as complete an answer and citations as possible since the entire session transcript is sent via email to the user once the librarian ends the session even if the user has already disconnected.

4.0. Conclusion

Cooperative virtual reference services provide an opportunity for libraries to offer expanded hours of service to their users. This is possible because participating cooperative libraries trust other cooperative members to provide good service to their users. The users should receive good service regardless of whether their question is handled by their local librarian or a cooperative librarian located somewhere else on the globe. To provide a fairly uniform level of service, a successful cooperative must have policies and procedures that are developed and adopted by its members.

Connaway & Radford (2008b) report that communication is critically important to a successful VRS encounter. When they queried users of FtF and VRS they found that librarian qualities are very important. Users expect the librarians in both FtF and VRS to be knowledgeable of reference sources and systems and to demonstrate a positive attitude and good communication

skills. The respondents also expect the answers to their questions and the information provided to them by the librarian to be accurate.

These findings suggest that reference librarians need to answer the specific question asked before general information pages are pushed to the user and to confirm that the information provided specifically answers the user's question. Query clarification and follow-up questions are methods to increase accuracy.

Reference librarians also need to practice basic interpersonal skills to build positive relationships with users in chat and FtF. Users expect and value positive, professional encounters with reference librarians. Most importantly, reference librarians should relax about time pressures, accurately answer the specific questions asked, and show their smiles! :) <grin> (Connaway & Radford, 2008b)

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