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Collaborative Chat Reference and Instruction

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Introduction

Librarians have long understood the need for instruction during reference. RUSA (Reference and User Services Association) defines reference transactions as "information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements" (RUSA, 2008). While this definition excludes formal instruction, it leaves plenty of opportunity for informal instruction. The ACRL's (Association of College and Research Libraries) *Information Literacy Competency Standards for Higher Education* also calls for students who can determine, access, and evaluate their information need (ACRL, 2000). Helping students achieve these guidelines can be applied in the virtual space as well. Supporting information literacy skills in chat reference extends the learning space.

Academic library reference services have expanded into the virtual world. In an attempt to reach users not physically in the library, academic libraries started providing virtual reference services. By taking advantage of synchronous virtual technology we can help our users when they need us wherever they are. Taking part in a collaborative chat service allows all participating libraries to provide a service to their users while sharing the staffing responsibilities. This paper will examine providing instruction in chat reference offered by a consortium.

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Background - Ask a UC Librarian

The University of California system encompasses 10 campuses located throughout the state. The system has 220,000 students and 170,000 faculty/staff members. It views itself as "one university, ten campuses." The libraries started the *Ask a UC Librarian* collaborative chat reference service in November 2006. We offer 50 hours of assistance per week when school is in session and use the QuestionPoint platform. QuestionPoint allows for IM between the librarians, pushing pages to the user, transcripts for users and librarians, and a wide variety of reports/statistics. While the platform is capable of co-browsing, the *Ask a UC Librarian* service does not use it. All campuses have provided links to the service on their web sites. Each campus is responsible for promoting the service on their campus. Daily staffing rotates through UC libraries.

From September 2007 through January 2008 we averaged around 120 questions a week when all campuses are in session. During that time undergraduates accounted for 48% of all requests; graduates 23%; faculty 5%; staff 7%; non-UC 13%; and "did not state" making up the remainder. And what were these requests? We can tell by analyzing a descriptive code a staff member can apply as part of closing a session. From January through March 2008, 37% of the transactions were coded as reference, which is defined as "assisting the caller with locating subject information." The next highest category was "access" (30%), which are "access to electronic resources ... circulation and directional issues."

An advantage of collaborative reference is that each campus makes available to its library patrons 50 hours of service while contributing much less staffing time. For example, in the 2007-08 schedule, the maximum for any campus is 10 hours. Another advantage is helping patrons with our shared purchase databases. There is a common core of databases that are licensed on a systemwide basis. Thus

when assisting a patron on a different campus a staff member is assured that both have access to many of the same databases from the same vendors. Finally, the UC system shares some of the same "jargon." For example, "UC eLinks" is the systemwide implementation of Ex Libris' reference linking software product.

Disadvantages of the collaboration revolve around assisting patrons from another campus to the same level of service that those on the home campus enjoy. For example, each campus may support a different solution to off-campus access. Some campuses emphasize their proxy server, while others prefer a virtual private network (VPN). As a follow up, a campus may recommend using either the web or the client version of the VPN.

Another challenge can be the different class numbering schemes on each campus. For example, freshman composition can be English 1, English 5, Writing 10, or Writing 39. In addition to different numbering schemes, the assignment requirements vary and require different resources to help with their research. Generally universities have writing programs that are based around a topic or book. Some campuses keep the same writing assignment every quarter, with slightly modified reading lists; this allows the library to create instructional guides that can be used again and again. Other campuses change the assignment every quarter, or let instructors choose from a list of texts, so the topics always vary. Librarians can still create online guides, but it makes it difficult to keep an FAQ page up to date with ever-changing links. Next, there are library rhythms in a school term. Midterm "season" is followed by papers, which is followed by finals. Anticipating what types of questions you may see on a shift (research paper or checking facts before a final) is tricky. That is because most, but not all, campuses are on the quarter system; the remaining campuses use semesters. Finally, while we share many core databases, each library subscribes to others unique to that campus. Assisting with resource selection and leading a patron through a search can be difficult if the chat provider doesn't have access to the same online resources as the patron.

Chat Reference & Instruction

Studies indicate that instruction occurs frequently during chat reference sessions. Johnston's (2003) review of the University of Brunswick's digital reference service found "60% of queries contain some instructional element" (p. 31). Moyo's (2006) analysis at Penn State documented that at least one instructional element occurred in 86% of chat reference transcripts (p. 225). She further found that 66% of the transcripts contained more than one element (2006, p. 225). Looking at the ACRL's *Information Literacy Competency Standards*, Ellis (2003) found that Standard Two, "access the needed information effectively and efficiently" was present in 62% of the chat reference transcripts (p. 110). In more studies by Graves and Desai (2007), transcripts were analyzed to identify the type of instructional method observed in IM, chat, and at the reference desk. They found "Resource Suggestion (librarian suggests print or electronic resources)" and "Leading (librarian leads the patron step by step to the needed information)" were the top two instructional methods observed in chat reference (2007, p. 13-14).

Industry standards tell us we should be practicing instruction during chat reference. Prior studies have shown that some type of instruction is being practiced during chat reference. In addition, another Desai and Graves' (2006) study showed that students are open to receiving instruction in this format. When asked whether they "wanted the librarian to teach them how to find information for themselves," 82% of the respondents marked "Definitely" or "Would be nice" (Desai and Graves, 2006, p. 16). Since the main users of academic libraries' chat reference service are students, they might be more open to instruction as they are used to being in an academic environment.

When students log-in to the chat reference service, they have a specific need. Librarians offering chat reference can take advantage of this opportunity to support the skills that, with any luck, the students were introduced to in a library instruction class. Beck and Turner (2001) state that "students are most receptive to learning research techniques at the point of need" (p. 83). That point of need extends into the virtual world. Chat reference also differs from a classroom setting because it's a one-on-one interaction. Librarians can quickly assess the student's needs and add appropriate instructional elements.

Collaborative Chat Reference & Instruction

The authors' experience reflects many of the studies listed above. Instructional opportunities have ranged from database selection, crafting a search strategy (using Boolean operators), evaluating the results, to retrieving the full-text using UC-eLinks. However, as noted above, we can be at a disadvantage when assisting patrons on remote campuses with specific assignments. That is partly because we are not party to informal conversations between staff in their home libraries. Information in those informal chats can include weekend plans, professional development opportunities, and what assignments are heavy at the reference desk and the best resources for them. Information in the last category would be especially useful to distant UC chat librarians who are also helping your patrons.

One solution for passing assignment alerts along is to use the virtual reference system itself. Recently students in an undergraduate research methods class on one of the author's campuses were asking questions about an assignment at the physical reference desk (K. Andrews, personal communication with K. Furuta, January 14, 2008). The author realized they were using virtual reference as well and logged into chat as a patron to give a heads up and tips

to the librarian on duty. In retrospect, a better method would have been to broadcast the alert to everyone staffing the service well in advance of the night before the due date.

Cross Campus Communication Tools

There is a need to share information with librarians on other campuses. We needed to find a way to share information about class assignments and any guides or pathfinders created specifically for these classes. The UC librarians are taking advantage of and exploring new tools to help this type of communication.

Policy Pages & Institutional Scripts

QuestionPoint allows each campus a web page, referred to as a "Policy Page," where they can create a FAQ for their local practices. The pages are a list of links to basic information like hours, remote access, databases, subject guides, etc. It helps the non-local librarian quickly determine which resources are available on that campus. Each campus can also customize local scripts. Scripting responses to common directional or access questions leaves more time for the reference interview, which can lead to an opportunity for instruction.

California Digital Library (CDL) Help Guides

The California Digital Library (a UC Library affiliated with systemwide administration) includes a repository of print and online guides to databases. Since we subscribe to a core set of databases, we can use or offer these guides as instructional tools. Since students are getting a copy of the transaction, offering URLs of online tutorials or class guides is an easy way to promote instruction after the reference transaction has ended.

Web 2.0 – Wikis and Blogs (work in progress)

The Policy Pages have their limitations. They are designed as FAQs for individual libraries. The UC *Ask a Librarian* group is looking at using new collaborative tools to help organize local information. Information that doesn't fit on the policy pages could be presented on a Wiki or a blog, for instance.

When we began the service, a listserv was created for all the librarians who participated in providing the service. An effort was made to use it to communicate shift reports, assignments, tips, techniques, etc. But there was a strong desire to use it only for official communications. Although listservs are a great way to communicate among staff in various locations, conversations do add to your email inbox. New online tools allow librarians to share information efficiently, but in a space where they can access the information only when they want.

Wikis and blogs have different strengths (P. Ayers, personal communication with K. Furuta, February 14, 2008). For authorship, wikis are well-suited for dynamically building documents with many contributors. Blogs are better suited for a more limited group of authors. A major difference between the two is the display format. Wiki pages are "flat," newly added information is displayed next to older material. Blogs are time oriented, like a news ticker. The more recent entries are at the top. Ideally the librarian could check the blog right before their chat hour to get a quick update on the type of questions that might come through in addition to information on instructional resources suited for those information needs.

Because each platform has differing strengths, we can envision using both. For example, a Wiki could be used to develop and post bookmarks to sites for answering commonly asked questions or to collaboratively develop and display consortium-wide policies. Conversely, a blog could be developed for alerts about assignments or problems with systemwide licensed databases to take advantage of its "news ticker" display. In addition, staff could set up RSS feeds to quickly check for new content. We are in the process of developing both a wiki and a blog.

Conclusion

Industry standards indicate that instruction should be a component of offering reference services. These skills should not be dropped just because the service is being delivered by a new technology. Studies show instruction is provided in chat reference on a regular basis. There are some added challenges when providing that service using a consortium. Using tools to help librarians communicate with each other can facilitate instruction regardless of the home campus of the librarian and the patron. By reinforcing information literacy skills in the virtual world, we're helping produce better life-long learners in the real world.

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