

*Libraries at University of Nebraska-Lincoln*  
*Library Philosophy and Practice (e-journal)*

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University of Nebraska - Lincoln

Year 2009

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Chat Reference: Training and  
Competencies for Librarians

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## Chat Reference: Training and Competencies for Librarians

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### Introduction

Technology has changed library services. In particular, the use of the Internet has made a significant difference in the way that traditional services are provided. Reference service is a critical service that has been changed by technology. Digital or virtual reference has developed as a way of helping patrons “not only on the desk, but in cyberspace” (Zanin-Yost, 2004). This article deals with the introduction of chat reference as a new concept that is not extensively used in Iranian libraries and also with competencies needed to implement it. The principles of reference service are discussed in connection with competencies for chat reference.

### Digital Reference

Digital or virtual reference has multiple definitions:

- “the use of digital technologies and resources to provide direct, professional assistance to people who are seeking information, wherever and whenever they need it” (Janes, 2003)
- “human-intermediated assistance provided to users via electronic media in fulfillment of users' information needs” (Pomerantz, 2003)
- “Internet-based question-and-answer services that connect users with experts and subject expertise” (VRD, 2003)

Improvement in technology has led to the development of different types of digital reference in last two decades. All have advantages and disadvantages. Users can get reference help quickly and remotely. They can use reference services whenever they like. The library can use this service to attract the new users. The types of digital reference include (Rosch , 2003):

- Email reference services
- Web forms
- Chat reference
- Web contact center
- VOIP
- Video conference

## Chat Reference

Chat reference service has been called real-time reference, live online reference, synchronous online reference, virtual reference, and chat reference. This article will use the term "chat reference." Chat reference is "a two-way conversation in real time, very much like talking to a reference librarian in person. Chat users can receive immediate feedback, thus they can use written language in the same manner used in a person-to-person conversation" (Zanin-Yost, 2004)

Chat reference can use free software such as Internet Relay Chat (IRC) and Instant Messaging (IM). These programs are used more than others because they are free. There is also commercial chat software, including LSSI's Virtual Reference Toolkit (now purchased by Tutor.com), and Metropolitan Cooperative Library System's 24/7 Reference (now merged with OCLC's QuestionPoint). They are based on eGain, a commercial call center software (Luo, 2007).

While chat references has advantages, including remote access and co-browsing, there can also be problems, such as:

- Lack of verbal or visual cues (Janes, 2002)
- Impatience from users during the transaction (Stormont, 2001)
- Users who leave the session without notice (Francoeur, 2001)

## Chat Reference Competencies

Luo (2007) identifies three kinds of competencies from the literature on reference and chat reference.

1. Lists from individual collaborative projects that are used for training
2. Statements developed by professional organizations or research initiatives
3. Discussions in works on implementing and managing reference, including chat reference.

She divides these competencies into thirteen categories, including competencies for general reference. General reference competencies include reference interview skills, which are discussed by Marsteller and Mizzy (2003), Ross et al. (2002), Hirko and Ross (2004), and IFLA (2002). Knowledge of electronic resources and searching skills are also competencies for general reference, and are discussed by Coffman (2003), Smith (1999), and DREI (2004). The ability to evaluate resources and services is described by Harris (2004) and Meola and Stormont (2002), as well as IFLA (2002). Other competencies are instruction, understanding of service policies, understanding of customer service ethic, and ability to derive professional satisfaction.

Competencies specific to chat reference services include online communication skills, ability to effectively use chat software, and ability to work in a collaborative environment

Competencies for general reference that are emphasized in the chat environment include basic computer techniques, discussed by Salem, et al. (2004), and the ability to work under pressure.

## Chat reference training

Chat reference is an important service that will be coming to libraries in Iran in the future. LIS curricula must begin teaching the competencies of new technologies such as chat reference.

Lou (2007) has suggested in her doctorate thesis two pathways can lead to the same goal of effectuating chat reference education in a master's program:

1. The first is to offer advanced reference courses that entirely focus on chat reference service so that those who are interested in the pursuit of reference librarianship can broaden their horizon by taking such a course. When designing an advanced reference course, the instructor may take the competency-based approach and structure the course based on objectives derived from the competencies that students are expected to achieve at the end of the course. The three types of essential competencies determined in this study, general reference competencies, competencies highlighted in chat and competencies specific to chat can be used as the foundation upon which to build the course content.
2. The second is to develop a chat reference module that could be included in a fundamental reference course so that everybody can gain a basic sense of what chat reference service is about. A chat reference module is only a component in a basic reference course and covers far less than an advanced course on chat reference does in terms of knowledge and skills related to chat reference. the goal of this course is to introduce chat reference to students and have them understand the essence of the service. The chat reference module is not detail-oriented and only covers the very basics.

The digital reference course developed by Harris (2004) was a course titled “An Introduction to Digital Reference”. The course objectives were:

- To review the reference interaction with attention to search models and conducting reference in a digital medium;
- To read scholarly articles on digital reference;
- To familiarize students with online sources and conducting online searches;
- To practice reference in an asynchronous environment; and
- To practice reference in a synchronous environment.

During this course, students learned models of searching, reference interview techniques and considerations, and a brief review of online sources as well.

In the redesign of this course, Harris decided to add more theoretical context and split it into two sections. The first section will cover the theory of digital reference, including “information behavior in the online environment and etc., In the second section, the focus will be shifted to the practice of digital reference, including “active learning in asynchronous and synchronous reference via the use of e-mail and chat software”.

Lou (2007) suggests two paths to incorporating chat reference training in LIS curricula. The first is an advanced reference course on virtual reference that would have competency-based objectives. The second is a chat reference module that would be included in a basic reference course. The module would cover less material than an advanced course, but would introduce chat reference to students.

Harris (2004) developed a digital reference course in which students learned models of searching, reference interview techniques and considerations, and a brief review of online sources. In the redesign of this course, Harris added more theoretical content, including “information behavior in the online environment.” The course also covers the practice of digital reference, including “active learning in asynchronous and synchronous reference via the use of e-mail and chat software.”

Lou (2007) introduces an online workshop for chat reference training. The goal of this four-week workshop was teaching techniques for chat reference services without face-to-face instruction, using four modules:

- The virtual reference environment
- Technology and software
- Quality control
- Role playing

The development of a training program starts by identifying competencies or best practices. In the studies that reported training programs chat reference services, some identified competencies by surveying librarians in other institutions and others created the competency checklist by engaging their own librarians in discussion.

Chat reference training has four primary categories and two subcategories: initial software training, training on chat reference skills, mentoring, and ongoing practice. Subcategories include training materials and assessment and evaluation of training.

- Software training is the first step of the program. Librarians must understand the software employed to support chat reference service. Software training delivered in a short period of time, often a day or two (Coffman, 2003).
- Mentoring: Mentoring provides personal assistance from experienced librarians. Coffman (2003) suggests that those who learn the skills quickly become mentors to relieve the project leader's workload.
- Ongoing training. Training is an ongoing process. New resources and changes in policies require continuous training. Ongoing training provides an opportunity for sharing experiences and discussing problems (Coffman, 2003)
- Training materials. Kawakami and Swartz (2003) state that access to competencies, best practices, and other training and policy materials is necessary for good performance. Multiple formats facilitate easy access. A website can be used to organize material such as software tips, contact information, and transcript examples.
- Assessment and evaluation. Evaluation is important for assessing the effectiveness of a training program. Trainees may fill out a questionnaire to assess their skills before training, and complete another to evaluate what they have learned after the training.

### **Principles of Reference Service in Iranian LIS Syllabi**

New technologies have transformed information delivery. Widespread use of the Internet has changed user expectations. Users expect to receive information quickly and without having to visit the library. One way of doing this is chat. Chat reference has become an important library service. Libraries in Iran should also implement chat reference. To accomplish this, librarians need training. Therefore, it is necessary to foster the required competencies within LIS curricula. Studying the LIS syllabi of several universities has led to the conclusion that the chat reference is best included in courses that teach the principles of reference service. Courses that teach those principles generally include the following subjects:

1. The concept and philosophy of the reference service.
2. Necessity of reference service.
3. Analysis of questions and process of giving suitable responses
4. Methods of searching and retrieving.
5. Types of reference sources
6. Characteristics of a reference librarian.

Some universities have added subjects such as information centers, application of new technologies, etc., to courses that teach the principles of reference service. But these modifications cannot teach librarians the required competencies for chat reference. The competency of understanding service policies can be included with the concept and philosophy of the reference services. Reference

interview skills can be included with analysis of questions and process of giving suitable responses. Knowledge of electronic resources and searching skills can be part of methods of searching and retrieving. Kinds of reference sources are part of the instructional role competency. Understanding of customer service ethic, ability to derive professional satisfaction, online communication skills, ability to work in a collaborative environment, and ability to work under pressure are all part of the characteristics of the reference librarian. It is not yet possible to accommodate some of the competencies required for chat reference in present reference and their syllabi, but there are two new alternatives: acquaintance with new technologies (software and hardware) and evaluation of resources and reference services can cover basic computer techniques and the ability to effectively use chat software, as well as the ability to evaluate resources and services. (Table 1)

Principles of reference service	Chat reference competencies
Concept and philosophy of reference service	Understanding service policies
Necessity of reference service	_____
Analysis of questions and the process of giving suitable responses	Reference interview skills
Methods of searching and retrieval	Knowledge of electronic resources and searching skill
Different kinds of reference sources	Knowledge of electronic resources
Characteristics of a reference librarian	Instructional role Understanding of customer service ethic Ability to derive professional satisfaction Online communication skills Ability to work in a collaborative environment Ability to work under pressure
Acquaintance with new technologies	Basic computer techniques Ability to effectively use chat software
Evaluation of resources and service	Ability to evaluate resources and services

Table 1: Relationship between principles of reference services contained in LIS syllabi and chat reference competencies

## Conclusion

Chat reference has become one common in libraries in developed countries. Most libraries in Iran do not use it, and many librarians know nothing about it. An important reason for its lack of popularity in Iran is a lack of familiarity and of the competencies that are needed. It is not covered in LIS curricula. Acquiring the competencies requires training. Training is the key to keeping library employees flexible and efficient. Changes in LIS curricula are required to keep up with the ever-changing environment.

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