

Discussion Topic: Face-to-Face Reference

I visited my local public library to find books for my 6 year-old son. After entering the library I approached the reference desk. Two librarians were stationed at the desk. One librarian was eagerly helping a patron with a request. The other librarian was looking at something on their computer. I approached the librarian on their computer and didn't notice any non-verbal queues indicating approachability. They tilted their head towards me when I mentioned I had a question and didn't seem overwhelmed by fielding my reference question.

I explained my son's current reading level and asked where to find books that will be good for him to read. The librarian sighed and mumbled that they didn't like answering this type of question. In a unenthusiastic manner they turned around and reached for a binder that included a chart showing that reading levels in one set of books may vary in another set of books. Instead of using reading levels set by a publisher the librarian recommended I use the five finger rule for determining books that will be best for my son. The librarian asked if I knew the five finger rule and then explained it to me after I answered that it wasn't familiar. After explaining the rule the librarian escorted me to the beginning reader shelves in the children section that I could browse through to find books for my son. When the librarian explained where the fiction and non-fiction beginner reader books were they asked if I had any more questions and then returned to their station at the reference desk. The librarian didn't follow up later to see if I found what I needed.

It would have been helpful for the librarian to recommend a few books for my son's age and school grade reading level or check up with me a little while later to confirm I found books that will meet my son's need. I left the library somewhat unsure I found books that best challenged my son and his reading abilities; books that were not too difficult nor too easy for

him to read. Despite a seeming lack of enthusiasm and active engagement to answer my question, the librarian provided helpful information with the five finger rule to help evaluate books that may help my son advance his reading abilities. This experience showed how following the RUSA guidelines can help to better meet the reference needs of library patrons.

Discussion Topic: Reference question via phone call

I called the main branch of the [Salt Lake City Public Library System](#). I found their phone number by searching for the library using the maps app on my smartphone. I planned to ask how I can check-out books onto my iPad. The phone rang once and was immediately answered with a friendly voice greeting me and identifying that I called the Salt Lake City Public Library. The librarian's tone of voice was friendly and inviting. They then waited for me to respond.

I asked how I can check out books onto my iPad. After allowing me to ask my question the librarian responded by providing me a set of quick instructions to go to the library's website from my iPad, click on "overdrive", and then login with my library account information. Their instructions seemed clear enough. They seemed attentive and patient by their tone of voice and responsiveness to my query. They didn't ask any questions to clarify what I was asking nor did they inquire about what I already knew or tried. It may have helped them gauge how detailed their instructions should be for me if they knew how familiar I was with the technology or with their website. They also failed to ensure I had access to the internet and to their website. Their instruction about clicking on "overdrive" was unfamiliar jargon to me. In addition to ensuring I knew where to look on their website it would have been also helpful if they explained more about the library's e-book policies as well as what "overdrive" meant. I asked a followup

question if there was an iPad app that I needed to check books out. The librarian answered that the app hasn't been working well lately but that using the website would be enough for me to check-out books onto my iPad. Once he finished I thanked him for the information and we hung up.

In retrospect the reference interview ended too soon. While on the call the instructions seemed simple enough but when I tried to follow what the librarian explained I got lost and had a hard time finding what they described. It would have been helpful for them to have asked if I wanted to try checking out a book while on the phone to ensure that I found what I needed. They assumed I would know what their instructions meant or that I had previous experience checking-out library materials on my iPad. They also assumed I had a library account that would allow me to check out materials. It also didn't help ensure the reference interview was successful since the instructions they provided didn't match how to find the library's e-book and audio book content on their website. Not ending the call with an open invitation to call back if I didn't find what I was looking for was another missed opportunity to make the reference interview over the phone more useful.

Although the librarian exhibited strong approachability in attentiveness, patience, friendliness, and clarity, they failed to ensure my question was fully answered. With a few additional questions and more detailed explanations the reference interview could have ended with a more satisfied, confident patron knowing that they had all the information they needed to successfully find what they needed from the library.

Discussion Topic: Reference question via email

This assignment involved identifying a library of choice, asking a reference question via email, and using the [RUSA guidelines](#) for reference and information service providers to analyze the email reference transaction.

I decided to send my reference inquiry to my alma mater's university library, the [Harold B. Lee Library](#). This library is the main academic library for [Brigham Young University](#) located in Provo, Utah. The library's main user groups are students and faculty doing academic research. They also have various special collections that are available to patrons in the local community including a Family History Library.

Asking My Reference Question

I first went to their website to find how to send a reference questions via email. On the front page of the library's website is an "Ask a Librarian" feature with a link to an email contact form for submitting a question. In the contact form I entered my name, email address, and the question, "How do I check out materials to my iPad?". Their form also asked whether I was an undergraduate, graduate student, faculty, staff, or other. I chose graduate student but wasn't sure if "graduate student" meant current graduate students attending BYU or if it included graduate students from other academic institutions. I then clicked send.

Visibility/Approachability

Even in a virtual reference transaction, libraries can be visible and approachable to virtual patrons in how they design their website. Easy-to-find links to available remote assistance as well as the wording they choose in guiding patrons to ask a question via email are techniques that help ensure their reference services are visible and approachable. The HBLL website is well designed for easily finding available remote assistance. They have an "Ask a Librarian" feature

clearly displayed on the right side of the website's front page under the hours of operation.

Clicking on the email link sends patrons to the library's "Contact Us" form. The form is an all-purpose form for patrons to submit a variety of questions or feedback to the library. An inviting description is presented above [the form](#):

"Ask a research question. Report an issue. Give us feedback. We promise to reply soon!"

After submitting my question I was sent to a page informing me that my question was received and that they will get back to me soon. They responded to my remote inquiry in a timely fashion. I submitted my question on Monday, February 17 at noon. I received a notice from a librarian the following day at noon informing me that my questions was passed along to the circulation department and that they will respond to me directly. The notification email ended with a friendly thank you for contacting them with my question. A few hours later on Tuesday I received a reply from the same librarian including an email thread with the answer to my question. A secretary in library circulations recommended I go to the HBLL website and take a look at their new OverDrive eBooks service. They also included a link to the news section of their website introducing their new OverDrive eBooks service. The email thread also contained internal communication between library staff that my question would be useful to include as a FAQ on their site.

Interest and Listening/Inquiring

Even though email doesn't have the same feel to gauge interest as a face-to-face or phone reference interview, I felt confident that they would answer my question based on the user experience they designed for submitting reference questions and the wording in their email responses. Their response the following day that my question would be answered was

encouraging to ensure that they are listening and will answer my question soon. The way they worded their email responses was friendly, positive, and helpful. They didn't use negative or condescending tones in their responses. From the email responses I got the sense that my question was understood and that they knew how to answer my question. To ensure privacy in the reference transaction the contact form only asked for my name, email, and patron status to help them better answer my question. The question field allowed me enough space to fully articulate my question.

Searching

The librarian didn't ask any questions to see what I knew about downloading library content to my iPad or if I had tried previously. Email reference transactions are challenging compared to face-to-face or phone interactions in that there isn't the same level of immediacy for the librarian to gather more information about what a patron has tried or what they already know about their question. For some types of research questions further questioning may be appropriate but for my kind of question continued questioning by library staff may delay the response leading to a less than satisfying experience. They didn't provide any additional instructions or guidance downloading content to my iPad other than the link to their news site announcing their new eBook service. I consider myself a fairly tech-savvy person who is comfortable exploring new technology but for patrons that aren't as familiar or comfortable with technology it may prove helpful to include a little more guidance along with the link to assist patrons who want to check-out content to their mobile device or computer.

Follow-up

The librarian answering my question included the invitation for me to let them know what I think after trying to download content to my iPad. Email communication using friendly statements that the patron is welcome to provide more feedback helps ensure a satisfying reference transaction and is an easy way for librarians to follow-up with patrons.

Conclusions

Overall I felt satisfied and comfortable asking reference questions via email. The HBLL did a good job maintaining approachability by the way the ask a librarian service was accessible from their main website. Their email form and user experience was clear and helped added to my confidence in asking my question. The quick responses and positive email communications followed RUSA guidelines to ensure my question was fully answered in a satisfying way. The answer they provided and follow-up statement followed the RUSA guidelines for interest, listening, and follow-up. They could have provided more detail or explanation of their downloadable content to make sure they meet the needs of patrons with varying skill levels with technology. For reference questions that don't need to be answered immediately using email to ask a reference question is a helpful, convenient resource that patrons with internet access can easily do without needing to physically be at the library.

Discussion Topic: Reference interview via Text/Chat/IM

This assignment involved identifying a library of choice, asking a reference question via text, chat, or IM, and using the [RUSA guidelines](#) for reference and information service providers to analyze the virtual reference transaction.

I decided to ask my reference question using my alma mater's university library, the [Harold B. Lee Library](#). This library is the main academic library for [Brigham Young University](#) located in Provo, Utah. The library's main user groups are students and faculty doing academic research. They also have various special collections that are available to patrons in the local community including a Family History Library.

Asking My Reference Question

I first went to their website to find how to ask a virtual reference question via instant messaging or texting. On the front page of the library's website is an "Ask a Librarian" feature with a link to use chat or text as a way to ask a reference question. I chose to use the chat option. When I clicked the chat link a chat interface displayed on the left-side of the page leaving room to co-browse while chatting (see attached screenshot). In the chat window I asked my question, "How do I check out materials to my iPad?".

Visibility/Approachability

Even in a virtual reference transaction, libraries can be visible and approachable to virtual patrons in how they design their website. The design of the library's website (the visual layout and text on the page) can help guide patrons to find the link to remote assistance. The HBLL website is well designed for easily finding available remote assistance. They have an "Ask a Librarian" feature clearly displayed on the right side of the website's front page under the hours of operation. Clicking on the chat link displays a chat window on the right-side of the webpage.

Soon after I submitted my question I saw some italicized, gray-colored text in the text window informing me that a librarian is typing. This visual cue that the librarian is typing is helpful to know that you are being attended to and won't be ignored. From the way they greeted

and responded to my question I felt there was a real person on the other side of the conversation rather than someone following a script. The librarian greeted me as part of a consortium without sharing their name or title. They immediately asked a clarifying question which was a little abrupt since I expected their first response to be more of a greeting and quick acknowledgement of my question. For a less abrupt start to the conversation the first greeting should be as if the patron is face-to-face with the librarian. Many of the obstacles with chat or instant messaging reference transactions can be overcome when approaching the conversation as if it was a face-to-face interaction.

Interest and Listening/Inquiring

For the duration of our conversation the librarian remained engaged and provided prompt responses to my questions. They showed interest by asking clarifying questions. When I asked how I checkout materials to my iPad they asked, “are you talking about eBooks?” They also asked me to clarify what I meant by “checkout to my iPad” which in this case is an important clarifying question. These questions help the librarian better understand the patron and can give the patron an opportunity to clarify what they mean. It's important for librarians to clearly understand what the patron means before providing relevant answers to their reference questions. I didn't have to wait long after my responses. The librarian was quick to respond which showed me they were interested in answering my question.

Searching

The librarian didn't provide any guidance for finding materials I could view on my iPad. Their answers assumed I knew how to find books and journal articles that I could download to my iPad. In this respect the reference transaction was somewhat lacking. Their answers were

quick but didn't include context and explanation for me to successfully find what I was looking for. During the virtual transaction I asked multiple questions to clarify their answers as they provided little guidance. A better approach would be to ask questions and provide detailed guidance to help the patron download reading materials from the library website to their iPad. The librarian could give the patron a specific example of something they can download for offline viewing on their iPad and offer to walk the patron through that process.

Follow-up

Although instant messaging lacks the ability for the librarian to make contact again after the reference interview, they have the ability to check and make sure that the patron has the answers they need and to offer additional help if necessary. In my case the HBLL chat system allows patrons to continue to browse and search on the library website. This gives the reference librarian an opportunity to guide the patron to what they are seeking during the chat session. The librarian I interacted with left the conversation hanging without asking if they had answered my question adequately. They didn't use closing statements encouraging me to use the chat feature again if I had more questions. Asking a follow-up question and using a simple closing statement are ways that librarians can do a lot with a little to help close off the conversation in a satisfying way.

Conclusions

Overall the chat session ended with the information I needed despite some rough edges during the transaction. I was expecting them to guide me to a specific page with materials I could download to my iPad or show me a sample search that would show me how to download materials to my iPad. Although they provided terse responses and didn't offer very much

guidance and follow-up to ensure I would be able to find what I needed, they were engaged in the conversation and responded promptly to my inquiries. It felt comfortable in this setting asking the librarian questions. Unlike email this type of virtual reference transaction provides immediacy that you get similar to a phone conversation or face-to-face interaction. Patrons can ask questions and follow-up questions while also being able to try on their own with co-browsing to find the information they need. By treating this type of interaction like an extended face-to-face interaction librarians can effectively meet the needs of patrons particularly the newer generation of patrons who are growing up in an increasingly social-media world.

Appendix

The following is the complete virtual transaction I had with the HBLL.

From: hbll_commons+greevester@gmail.com@chat.library3lp.com

Subject: Chat Transcript

Date: February 26, 2014 at 8:05:03 PM MST

To: greevester@gmail.com

Reply-To: michael_whitchurch@byu.edu

02:47 11656646841393469221315420@library3lp.com How do I checkout items onto my iPad?

02:48 hbll_commons@chat.library3lp.com Hi, are you talking about eBooks?

02:48 11656646841393469221315420@library3lp.com Is that the only type of materials that I can checkout to my iPad?

02:49 hbll_commons@chat.library3lp.com what do you mean, checkout to you iPad?

02:49 11656646841393469221315420@library3lp.com I mean read or view on my iPad.

02:51 hbll_commons@chat.library3lp.com Well, you can access journal articles as well, if thats what you're looking for

02:51 11656646841393469221315420@library3lp.com Can I download them to my iPad for offline use?

02:51 hbll_commons@chat.library3lp.com ya, you can download the PDFs and view them whenever, as long as the library has access to the full text of course

02:53 11656646841393469221315420@library3lp.com You mentioned eBooks. How do I get eBooks from the library to my iPad?

02:53 11656646841393469221315420@library3lp.com And see what eBooks are available?

02:55 hbll_commons@chat.libraryh3lp.com Well with those, I don't know which you can download, and which you cannot. But there are several books that the library has access to the online versions of

02:55 hbll_commons@chat.libraryh3lp.com Unfortunately, there isn't a "browse" feature in the catalogue, so finding them is a bit tough...

02:56 11656646841393469221315420@libraryh3lp.com Where do I go to find what is available?

02:59 hbll_commons@chat.libraryh3lp.com That's the thing... They're in the catalog, but there's not search function to look at specifically all the ebooks the library has access to.

02:59 hbll_commons@chat.libraryh3lp.com There is a subject page for eBooks, but there's no "peruse at your leisure" feature in it...

02:59 11656646841393469221315420@libraryh3lp.com I see.

03:00 hbll_commons@chat.libraryh3lp.com Frustrating I know...

03:00 11656646841393469221315420@libraryh3lp.com Are the eBooks mainly a certain genre of book? Like popular fiction?

03:00 hbll_commons@chat.libraryh3lp.com No, they're across everything. Typically in searches for book, some will come up with the availability of being online

03:01 11656646841393469221315420@libraryh3lp.com Ok thanks.