About Us

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Agenda

Background:
- OCUL and Scholars Portal
- Ask a Librarian
- The Virtual Reference Mentorship Program
- Previous research about student staffing

Case Study:
- Hiring
- Training
- Assessment

Takeaways and Next Steps

Q&A
The Ontario Council of University Libraries

OCUL is an academic library consortium of libraries at the 21 universities in Ontario, Canada
OCUL Universities

Diverse university system:

- 1 flagship
- 6 research-intensive
- 9 mostly undergraduate
- 4 regional (“in-between”)
- 1 military college

Range from 1,323 to 83,368 FTE students
Scholars Portal

- Service arm of OCUL
- Shared digital information infrastructure, collections, and operations
- Delivers a wide variety of services to OCUL member institutions
- Most services are for all members, some are opt-in
Ask a Librarian by the Numbers

- Scholars Portal librarian coordinates the service
- Opt-in service currently offered at 14 of the 21 OCUL institutions
  - Serves student population of approximately 365,000 FTE
  - Available at 105 libraries in the 14 participating schools
- Open 67 hours/week during the academic year
- Receive approximately 25,000 chats annually
- 71% of users chat with us from off-campus
- Also offered in French at 3 OCUL libraries as Clavardez avec nos bibliothécaires
Ask a Librarian Staffing

- Participating libraries provide staffing hours relative to their student populations and service usage patterns
- Incentives to provide evening and weekend staffing hours
- Every hour has between 4 - 7 chat operators staffing the service
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Scheduling Challenges

- Consistently being able to offer 67 service hours of coverage in English and French
- Being able to handle user demand
- OCUL librarian/staff availability outside of business hours (9 am - 5 pm)
- Staffing shortages at member libraries and budget pressures
Virtual Reference Mentorship Program

- Library school students (MI/MLIS) and recent graduates from across Ontario are hired to work on Ask a Librarian part-time
- Paid experiential learning opportunity for students/new librarians
- Flexible scheduling accommodates school and work commitments
- Participants receive training, guidance from experienced librarians, networking opportunities, professional reference
**Benefits**

- Cost-effective way to make up staffing deficits
- Evening and weekend coverage
- Additional operators to handle high volume of chats

**Issues**

- Steep learning curve
- Unfamiliar with consortial environment
- Potential service quality issues (accuracy, completeness, satisfaction)
Previous Research on Student Staffing

- Performance: reference librarians outperform student assistants, but margin is small
- Satisfaction: students receive comparable satisfaction ratings to librarians
  - Commended for approachability and helpfulness

Takeaway: with continual oversight, students are a viable staffing option, and they can improve on their weaknesses through training
Previous Research on Students’ Weaknesses

- Informal communication style
- Deviation from certain RUSA best practices
- Research skills: searching for the patron and providing sources
- Less likely to offer instruction
Case Study: Hiring, Training, and Assessing Virtual Reference Mentees
Hiring

April - June

- Candidates with previous public service experience
- Interview is online via Skype’s IM functionality to mimic the chat reference environment

What we look for:

- Online communication skills
- Search abilities and knowledge of electronic resources
- Response time, typing accuracy, message length
- Conformance to best practices for virtual reference
Training

July - August

- One-day, 8-hour session
- Trainers:
  - SP librarians
  - Librarians and staff from OCUL member libraries
  - Experienced mentees
- Mix of presentations and exercises
1 - Chat Software

BEST PRACTICE: the most effective approach to training is to provide opportunities for hands-on practice or experience

- Most student workers are confident in their technology skills and comfortable with chat tools
2 - The Consortial Service Model

BEST PRACTICE: providing background information about why policies and procedures are in place makes student workers more likely to comply

- We use an FAQ format to introduce service policies and procedures
- See lessons in practice through the experiences of a second-year mentee
3 - Reference and Research Competencies

BEST PRACTICE: guide students through the reference interview and provide appropriate benchmarks

- Present stages of the reference transaction and behavioral guidelines for each
- Highlight differences between face-to-face and online reference interviews

BEST PRACTICE: give students effective starting points for different question types

- Introduce how to answer questions typically posed through chat
- Take students through research “bootcamp”: subject-specific research tips and key resources
- Explain when to refer
4 - Customer Service and Communication

BEST PRACTICE: reinforce lesson through an interactive exercise, e.g. review of an actual chat transcript

- Explain limitations of chat and misunderstandings that occur online
- Introduce communication strategies for each stage of the reference transaction
- Present effective online teaching techniques
- Lessons for inclusive, accessible public service
5 - Follow-up

- Access to training environment where mentees can practice using chat software
- Opportunity to shadow experienced operators during first week of work
- Periodic check-ins with Ask a Librarian coordinator
- Staff website with documentation and archived training materials
Assessment

Throughout academic year

- Transcript reviews
- Exit survey responses
- Missed shifts
Transcript Review

- Language and structure of student workers’ chats is more casual than that of librarians
- Prone to beginning search for information without conducting thorough reference interview and clarifying information need
- Some mentees have a teaching orientation in their chats
The service provided by the [operator] was... (N = 292)
“[Mentee] was really super helpful! It’s [a] wonderful idea to both familiarize the student with resources they can use and also put the effort in to help find specific articles simultaneously with the student…”

“...I think this was the only time when the [operator] really took the time to help me with my problem and did not rush me in anyway [sic].”
The [operator] provided me with... (N = 291)

- Just the right amount of assistance: 95.2%
- Too little assistance
- Too much assistance
Would you use this service again? (N = 288)

No
1.7%

Yes
98.3%
Takeaways - Training

- Compact training program can adequately prepare student workers with an LIS background for chat
- Invite variety of guest speakers
- Hands-on, interactive training approaches work best with students
- Emphasize reference interview, research skills, and communication
Takeaways - Performance

- Can assess student workers’ performance using simple tools and techniques
- Room for improvement in the reference interview
- Patrons satisfied with service
- User comments cite the mentees’ friendly and welcoming attitude
- Mentees may be taking on a teaching role
Next Steps

- Emphasize listening and enquiring stages of the reference interview
- In-depth evaluation of mentee transcripts
- Implement rubric to provide more standardized and comprehensive evaluations
- Provide mentees with formalized opportunities to provide feedback on the program
Thank you!

Questions?

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