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Training Millennials: A practical and theoretical approach

Abstract:

Purpose: For student reference supervisors and trainers, it is crucial to understand the characteristics of the Millennial worker and how we can effectively train student reference employees in virtual reference. The purpose of this paper is to present best practices for training the millennial generation of reference workers on virtual reference.

Approach: This paper is a combination of a case study and theoretical approach including a literature review of Computer Mediated Communication (CMC) theory as well as Reference and Users Services Association (RUSA) best practices. This paper describes the creation of a training manual for the Millennial student worker.

Findings: This project proves that a different style of training is necessary for the Millennial generation.

Social Implications: The library atmosphere is social with several types of communication methods. Many academic libraries use student employees to staff high traffic public service points. It is critical that we train students to leave behind their student mentality and behave professionally. It is a question of re-conditioning the Millennial from their relaxed methods of communication to the more professional style our patrons expect.

Practical Implications: This paper presents practical training techniques that are grounded in two major communication theories - - "Politeness" theory and CMC theory and applies these theories to the practical training of the Millennial student.

Originality/Value: This paper presents the benefits of having a specific training approach when supervising the Millennial student reference worker, particularly when it comes to training for IM/chat reference services.

Keywords: student employee training, IM reference, computer-mediated communication, virtual reference, Millennials, politeness theory

Paper type: Case study

INTRODUCTION

Do Millennials understand the intricacies of providing professional reference service without communicating in a style that is too casual? If not, how are student employees to be trained to handle the IM reference questions and not have a casual tone in their communication style? This paper explores these questions and provides a training manual for Millennials that incorporates best practices on virtual reference and suggests that it is necessary to train Millennials differently. Politeness theory and computer-mediated communication (CMC) theory are used in combination with a case study to provide training techniques. A literature review of politeness theory, computer mediated theory (CMC), and Reference and User Services Association (RUSA) best practices are provided. The success of the training manual at Western Michigan University demonstrates that any university can apply this manual to its own student training for IM reference.

The current influx of the new generation of students, Millennials, commonly known as those born between roughly 1982-2002 (Prensky, 2001, p.1) have created a new challenge for librarians seeking to maintain an efficient, effective, and courteous library environment. Traditional approaches to technology collide with newer modes used by Millennials and suggest that a tension exists between the casual and informal use of Web 2.0 technologies by Millennials and RUSA best practices which outline a very specific course of action for the reference interview. This paper argues that, with the right training, Millennials can accommodate RUSA guidelines by describing how to train Millennials to use IM reference effectively and in a way that satisfies their own generational needs along with serving the needs of academic patrons. This type of training is applicable to any academic environment that adheres to RUSA best practices.

The following literature review provides a background of how Web.20 currently impacts the library environment and an overview of literature about the generation that is interacting with library patrons. Then, politeness theory and CMC are considered in regards to the interpersonal connections that are made between student worker and patron.

Literature Review

Understanding Web 2.0

It is not uncommon for libraries to conduct the majority of their interactions with patrons through Web 2.0 technologies. A term coined in 1999, the phrase "Web 2.0" refers to the interactivity of websites versus Web 1.0 or "static" websites.

Information is absorbed by users on a static website, whereas on a Web 2.0 website users interact actively and provide information (Scholz, 2008). It is important to recognize that today's college students grew up using Web 2.0 technologies for social purposes and are accustomed to the informal and unprofessional use.

Webopedia.com describes IM as "a type of communications service that enables you to create a private chat room with another individual in order to communicate in real time over the Internet, analogous to a telephone conversation but using text-based, not voice-based, communication". According to Abram (2004), it is estimated that "85 percent of kids between 15 and 25 have at least one IM account" whereas "fewer than 5 percent of adults over 30 have an IM account" (Abram, 2004, p. 42).

The standards of IM in a workplace setting are more formal than younger employees expect. For example, IM "language" of younger users is rife with acronyms, shortened spellings, and alternative spelling, a mode of communication that is not acceptable to the older generations (Johnová, 2004). The goal is to have the generations meet in the middle - - the younger employees must remember that there is a code of professional communication while older IM users need to adapt to the possible use of IM language and not be dissuaded by it.

The 2004 Pew Study "Internet & American Life Project" offers insight into the use of Web 2.0 applications. It breaks down the numbers and shows who is or isn't using IM. "IM use differs markedly among age groups. Most notably, younger Internet users employ IM in greater numbers and more ardently than older generations" (Pew, 2004, p. ii). As the 21st century arrived, teens were pre-disposed to adapt to new technologies.

"The Implications of Web 2.0 for Academic Libraries", (McManus, 2009), cites that "at George Washington University Library, IM has become the preferred reference

services method by students. The librarians became aware of this through consistent student feedback on their reference services during the 2005-2006 academic year". McManus elaborates and says "as in the previous Library 2.0 initiative, it was found that moving from virtual reference services to a reference service that patrons were more familiar with would enhance the efficacy of the library's reference services" (McManus, 2009). McManus (2009) ignores the uneasiness in older generations, saying that one only needs to be moderately comfortable with computers.

Others, such as Houghton and Schmidt (2005), believe that IM training only takes five minutes. They cite that "IM's true strengths are in speed, offering local service to library users, and the technical ease with which IM reference takes place (Houghton and Schmidt, 2005, p. 30). However, they do not articulate the problem of combining reference interview techniques while providing IM reference.

It is evident that IM reference service is more sophisticated than when first established and has created a sense of community and language. This can cause some hesitation for the older generation of librarians, who may be afraid that they are not providing adequate service to IM patrons. "Some librarians are afraid of being overwhelmed with questions, are not comfortable handling multitasking...don't type very fast, or, just prefer fact-to-face interaction" (Schmidt and Stephens, 2005, p. 35). Foley says that librarians in general prefer face-to-face reference:

"It became evident that most librarians felt more pressure answering questions during IM than at a physical reference desk. They sensed an obligation to provide an exact answer and to provide it rapidly, making it difficult to give clear answers if the response required extensive typing. Much of this anxiety arose from serving online patrons who cannot exhibit facial expressions and body language for the librarian to interpret nor see the librarian actively working. However, these concerns may be misplaced because few users complained that a librarian took too much time. On the contrary, the majority of patrons were found to be patient, cordial, and very appreciative, particularly evening visitors"(Foley 2002, p. 43).

Understanding the Millennial

In order to create a successful reference experience for a patron, it is essential that trainers know how to best reach Millennial employees. Marc Prensky, says that Millennials are "digital natives, having grown up with sophisticated technology in their homes, and they have a different relationship with technology than previous generations (Prensky, 2001, p.1). Millennials are constantly networked and interfacing via technology and expect appropriate use of technology at home, work and in school. Millennials have become pragmatic and are adept and able to sort through the onslaught of information efficiently and quickly (Lancaster & Stillman, 2002, p. 231).

The Millennial generation is considered (Prensky, 2001, p. 1) to be the most wanted and planned generation and feels entitled if not privileged. The traditional social constructs that previous generations take for granted are often misunderstood, if not ignored by Millennials. They respect authority but do not necessarily recognize the importance of the social hierarchies that previous generations acknowledge. They are ambitious. (Essinger, 2006, p.105). Lancaster (2004) says that one of the negative stereotypes of the Millennial is that they are unaware of their own lack of skills (Lancaster, 2004, p. 231). "There is increasing evidence that students do not use technology effectively when they conduct research or communicate" (Katz, 2007, p. 4). In order to rectify the inadequacies, the goal of library professionals should be to train students adequately.

An Overview of WMU Libraries and IM Reference

Western Michigan University (WMU) is a large mid-western public university where the majority of students come from in state. WMU is a middle range university with an average enrollment of 25,000 students. WMU libraries offer several forms of reference services, including chat, e-mail, phone, face-to-face and personal training. There are 8 faculty librarians who staff the Central Reference Desk, 2 paraprofessionals and 10 students. WMU houses 4,936,932 print and non-print resources.

WMU's IM Reference System

WMU Libraries originally used Docutek (<http://www.docutek.com/>) to offer real-time IM reference. It was run by librarians for very limited hours, for example, only on Tuesdays from 4 p.m. to 6 p.m. and Wednesdays from noon to 3 p.m. There were so few questions that the Central Reference Department did not have a chance to develop a reference procedure or IM reference interview guidelines. They focused more on the technical aspects of Docutek rather than quality reference services.

WMU libraries keep track of reference transactions by using "Libstats" (<http://code.google.com/p/libstats/>), a software program from the University of Wisconsin-Madison that tracks statistics on the number of questions asked. During the 2008-2009 academic year, the statistics show that IM reference was neck and neck with e-mail reference service, each taking 6% of the total number of reference questions for the year.

Next, IM service was offered through Meebo, a free online IM program at www.meebo.com. IM reference restarted in the summer of 2008 and a Meebo widget, which is an application that enables a user to perform a function or access to a service on the computer, was embedded onto the library homepage. Unfortunately, Meebo allowed only one person to log in at a time. Therefore, it was decided by the reference faculty to have the student log in and monitor the queue.

The decision to use student workers to monitor IM reference was a strategic and logical choice made in regards to the physical layout of the Central Reference space. There are three service computers (two are at the main reference desk and one is off to the side). Two librarians are stationed at the main reference desk computers with a student seated at the third computer. In the spring semester of 2010, students handled almost 84% of all IM transactions. Librarians answered only 8% and the remaining 8% were answered by paraprofessionals.

Current Training Process

Hiring Central Reference student employees is undertaken by the Central Reference Department coordinator, a paraprofessional and it takes place in the late summer and new hires start their employment at the beginning of the fall semester. Once hired, the new students undergo an extensive twelve-week training program under the supervision of a faculty librarian during the first semester of their employment

where they learn the intricacies of working in the Central Reference Department. Each week, for approximately two hours, the new reference students learn the fundamentals including the philosophy of reference service, introduction to print and electronic reference resources. One of the Central Reference librarians coordinates the program and meets with the students every week. Within the twelve weeks, the students are introduced to broad subject disciplines and the most relevant supporting reference materials and librarians.

Tracking Client Satisfaction

The WMU Reference Department currently monitors user satisfaction for IM reference service by reviewing the student IM transactions and using them for learning tools, providing models of successful transactions as a way to improve communication. The review of student IM sessions reveals a need for training Millennials on how to handle IM reference questions.

In the fall of 2008, very few of the faculty librarians were active in providing reference services. This was possibly due to their hesitation to use new technology. Reference services were staffed mainly by students who answered Meebo reference questions without guidelines. This situation conflicted with the guidelines that the Central Reference Department set out for the rest of reference service and provided an opportunity to implement formal training.

Understanding RUSA Guidelines

The RUSA 2010 "Guidelines for Implementing and Maintaining Virtual Reference Service" establish procedures for IM reference service:

The purpose of these guidelines is to assist libraries with the implementation of virtual reference. The guidelines provide direction, without being over-prescriptive. Application will vary among institutions but the committee hopes to have cast the model broadly enough to provide a framework for virtual reference that can be widely adopted and which will endure through many changes in the ways in which libraries provide virtual reference services" (RUSA 2010).

Student employees in the role of information provider need to be familiar with and be able to implement in an IM environment the five RUSA standards which include:

1: Approachability; 2 Interest; 3: Listening/Inquiring; 4: Searching, and 5: Follow-up. With these five guidelines librarians and reference employees have a suggested level of professional performance by which they can follow (RUSA, 2010).

Chat Reference Transcripts Suggest a Course of Action

Below is a sample chat reference transaction taken from the spring semester of 2009, before any formal chat reference policies, training or official procedures were created.

Transcript One

[16:29]meeboguest; how can I get access to financial websites through the library

[16:30]meeboguest: hello?

[16:31] wmulibraries: Sorry, we are looking into it.

[16:31] meeboguest: ok. Thanks.

[16:32]wmulibraries: are you looking for databases with access to financial topics?

[16:32] meeboguest: something like moody's or dnb or other financial websites

[16:33] meeboguest: I was told by a teacher that the library had some subscriptions.

[16:35] wmulibraries: Ok. We do have Moody's which is now called Mergent. From our main library webpage there is a tab that says "research". Click on that, then select subjectguides.

16:35] wmulibraries: In that list, there is a subject guide for business.

[16:36]wmulibraries: Then select "Company Information". Then you can scroll down to Mergent Online.

[16:36] meeboguest: thank you.

[16:37] wmulibraries: You're welcome. If you need anything else, just let us know.

Below is another transcript of an IM reference question done prior to training.

Transcript Two

[10:34] meeboguest: I am trying to find an article about the media influence binge drinking or underage drinking. on westcat online. I need a source from western but it lists

topics for you here and known are what I need and I can't figure out how to search this.

[10:34] wmulibraries: Well, Westcat is our catalog for the items we have in print.
[10:34] meeboguest: oh.
[10:35] meeboguest: so you are saying I have to come in there?
[10:35] wmulibraries: What you can do is from the wmich.edu/library site, click on the tab that says "databases a to z"
[10:35] wmulibraries: then go to the link that says "databases by subject"
[10:36] meeboguest: would this be easier for me if I came in there to the library?
[10:37] wmulibraries: If you'd like us to help you search, then yes. Come to the referencedesk at the library.
[10:37] meeboguest: thank you.
[10:37] wmulibraries: you're welcome.

The transcript from the first interaction reveals that there is no adherence to the RUSA standards for reference. For example, the student forgot to include basic reference interview techniques in which he or she are well trained for in face-to-face and telephone reference. Some of the ignored standards include standard number 2.6 which states that a reference attendant "maintains or re-establishes word contact" with the patron in text-based environments by sending written or prepared prompts, etc., to convey interest in the patron's question. A complete lack of introduction shirks standard 2.7 that states that there should be some acknowledgement of the user in a timely manner. Without any restatement of the reference question, the transcript reveals that standard 2.8 is ignored; this standard states that in the reference interview, the reference provider "States question-answering procedures and policies clearly in an accessible place on the Web. This should indicate question scope, types of answers provided, and expected turnaround time." Again, the terse conversation without any introduction is devoid of personal intent and seems cold and unwelcoming. Standards 3.1, 3.2 and 3.9 state that in reference one should "communicate in a receptive, cordial, and encouraging manner", "use a tone of voice and/or written language appropriate to the nature of the transaction", and " maintains objectivity and does not interject value judgments about subject matter or the nature of the question into the transaction" (Guidelines for Implementing and Maintaining Virtual Reference Services, 2010) The transcripts illustrate a need for retraining reference students on the basic elements of reference service for IM. A training manual will provide the how AND the why these changes are needed.

Many transcripts showed similar styles and it was alarming to discover so many reference interactions that deviated from RUSA best practices. These infractions were of especial concern to the faculty librarians, and cause for quick action to assess the situation and devise a retraining strategy. It was decided by the reference department to create a new training procedure that kept in mind the generational characteristics of the Millennial reference student employee. The goal of the new manual was to look beyond RUSA guidelines to find other theories that would complement training for virtual reference. In addition to the RUSA guidelines, theories from other fields that could help students understand and learn the importance of "netiquette," were explored as well as research regarding the appropriate use of technology for reference service employees. The goal of the central reference department was to establish student training based on these three practices and theories in hopes of avoiding any more reference interaction infractions. Looking towards the field of communication, research regarding computer-mediated communication theory and politeness theory provided an appropriate direction and target.

The Challenge: Training Millennials

When looking at the transcripts of IM reference, it is clear that not enough time is spent on the art of the reference interview when adapted to the IM reference. While the first session is devoted to the philosophy of reference service and to the importance of the reference interview process, perhaps the student employees are not making the connection that these principles should be used in an Instant Messaging interaction. Special care needs to be taken to emphasize this in the IM training.

In order to address the unsatisfactory IM communication in reference transactions, three areas were addressed: (1) Millennials and how to manage them; (2) the nature of computer-mediated communication; and (3) politeness theory. These three areas, plus the guiding principles of the RUSA Guidelines facilitated the creation of an effective and successful training manual.

The most successful way to reach these Millennials is to not only give them the HOW

of performing appropriately with technology during a reference interaction, but provide them with the WHY. Providing the WHY rings truer for this ambitious generation, helps them connect the pieces, and satisfies their inherent need for greater control. Rather than dictating a specific behavior, training should be based in theory so as to satisfy their need for greater global understanding and need for learning, remembering that the Millennial in the work place wants control and expects a certain level of autonomy. While training students, supervisors need to remember that the students are adults, albeit young adults. Trainers need to take the students' generational attitudes into consideration in the training process. They want to be entertained. They expect a certain level of and work best in teams or in pairs. The work environment should be welcoming, including food and music (Anonymous, 2007). The work environment in this context refers to the training sessions, not the actual staffing of the reference desk.

Training for the digital "native," born into an informal social hierarchy of the virtual world needs to include not-so-subtle reminders that reference interactions require a certain social construct and/or contract between the library and the patron. Librarians need to remind the student employee that patrons expect appropriate use of technology for research as well as appropriate social constructs. What the student may consider a suitable use of technologically based research, coupled with lax social skills, and may put off the patron who comes into the reference interaction with a different set of expectations. Librarians need to bring the two sets of expectations into agreement.

Aside from being entertained, Millennials' need for a certain level of structure and supervision. (Moon, 2007). Sufficient time needs to be allotted for orientation. Assignments should be appropriate and meaningful, not wasting the student's time. Orientation should have shorter modules that test and review often, and most importantly be fun. Student assistants may wish to collaborate on their assignments. Finally, they want their opinions to be heard because they have the expectation that their thoughts matter. Therefore, allow a portion of the training time for discussion to hear their opinions. Lancaster (2004) says that Millennials are a practical generation who has acquired a good amount of work experience. Savvy trainers will build upon their experience and incorporate their reference experience into the reference training sessions.

Millennials respond best to an orientation program that is hands-on and moves at a rapid pace. Incorporating some computer-based instruction is a good idea for students as it allows them to go at their own speed and acknowledge their ability to manage information (Lancaster, 2004).

Rationale for Training Millennial Students Differently: Using Computer-Mediated Communication (CMC) Culture Theory in IM

Why is it that Millennials succumb to the informality of IM? Here, the author suggests that computer-mediated-communication (CMC) answers a way of understanding social dialogue via computers in order to improve IM reference. IM is "near-synchronous computer-based one-on-one communication. With a fast network transmissions ties are fractions of a second and the experience is of near-synchronous interaction" (Nardi *et. al.*, 2000, p. 2). It has been documented that patrons have a different set of expectations when engaging in IM reference. There is an unspoken contract that dictates the appropriate level of politeness and formality.

The hypothesis outlined by Maness in 2008 has historical grounding. The same trend that he noted in 2008 were noticed in 1984 by Kiesler, Sigel and McGuire. What they said still holds true. The social and psychological aspects of CMC call to question the need for formal training on etiquette. The authors go on to say that social standards in CMC are "less important and communication will be more impersonal and more free because of the rapid exchange of text, the lack of social feedback, the absence of norms governing the social interaction" (Kiesler, *et. al.*, 1984, p. 1126). Kiesler, Sigel and McGuire go on further to explain that formality is less important due to time and information processing. Less time is spent processing information that is being communicated and the pace of exchange is faster due to the absence of regulating feedback, such visual cues, that one would get in face-to-face interactions.

Kiesler, Sigel and McGuire postulate that CMC is a social equalizer. This means that "group members may participate more equally in computer communication" since there is no observed hierarchy (Kiesler *et. al.*, 1984, p. 1126). For example, CMC in the IM reference scenario means that the respondent to the reference question has

no idea who the patron is. It could be a faculty member, student, or community member. The nature of CMC such as IM breaks down the hierarchical structures. The person answering an IM reference question needs to remember that there is no hierarchy at the onset of the communication and that it is up to the respondent to create that structure assuring the social boundaries of the IM transaction. (This will be expanded further in the following section on Politeness theory.) Nevertheless, the IM participant on the other end is, at the beginning the equal to the reference worker.

For students, this should not be confused with the idea that the patron as an equal does not mean that the patron is a peer. There is a difference. It is common that there is an opinion that there is an expected hierarchical structure and this can pose problems for IM reference. As CMC developed in the early 80's, it started as an underdeveloped means of communication with no real structure. There were no rules or guidelines to follow. In 1984, CMC was said to have had an "immature etiquette" (Kiesler *et. al.*, 1984, p. 1126). IM reference, being a part of the CMC culture, needs rise above the idea of immature etiquette and branch off into a defined and structured communication method. Unfortunately, without the proper training to adapt to the new medium, the student wrongly lapses into this gray area, incorrectly assuming that there are no social structures in place. This paper presumes that Millennials view that the IM patron misinterprets the idea of equal to mean peer. Thus the social hierarchy breaks down. The virtual interface enhances a lack of distinction for the student employee who seems to assume that the patron are peers rather than intellectual equals working in a specific. Patrons expect a certain discourse in IM since the patron does not the s/he maybe interacting with a student and not a librarian.

IM "occupies a certain middle ground between spoken and written genres and formal and informal styles (Maness, 2008, p. 32). As Maness states, reference chat is "more formal than student-to-student IM conversations" (Maness, 2008, p. 32). The patrons, our library customers, expect and want a more formal style. The student reference assistants need to comply. The formality is due to the fact that the social relationship is varied so much so that there is a discrepancy in social positioning. A social hierarchy needs to be followed. Student patrons tend to follow the traditional social hierarchical constructs in chat with a librarian, than with each other in a social

context. Maness remarks that they tend to be more formal and not among themselves (Maness, 2008, p. 32). In a study that compared chat transcripts of students with librarians Maness discovers that "the students are more formal when addressing librarians, and librarians, relative to students, are in some ways more formal and in some ways more informal. All together, the student-to-librarian conversation is markedly different from the student-to-student conversation, and could be seen as being more formal in its style, more written in its genre" (Maness, 2008, p. 32). It is necessary to train the student on these nuances so that they maintain the appropriate tone and style of IM reference.

In Maness' examination of librarian and student chat, he hypothesizes that students are far less formal and librarians are far more formal in CMC. The worry is that the student, being too casual, will be less formal when engaged in an IM reference transaction, and thus resulting in a lapse of adherence to RUSA guidelines such as listening and inquiring which are the core elements of the reference interview.

Kiesler *et al.*, (2004) explain that even back in 1984, CMC maintained social anonymity and had the effect of depersonalizing the reference interaction. Therefore it is easy to lapse in to informal language and style since the patron is never truly identified, which refers back to RUSA guideline 1. "Approachability" and identifying whom the patron is.

In 2000, Nardi *et al*, tracked the informality trend in IM communication. "IM is typically casual, informal and friendly. Relaxed grammar and spelling are the norm. Standard capitalization is often ignored " (Nardi, *et al*, 2000, 3). Nardi *et.al*. says that "the key reason for this informality lies in the near-synchronous nature of IM. Conversations can be more interactive because the rapid and evolving nature of IM. It means that there is immediate contact for the current interaction" (Nardi, *et. al.*, 2000, p. 3).

Another reason IM interactions tend to be informal is that the typical user, outside a library context, interacts with a small set of people they know well, or plan to get to know well, (Nardi, *et. al.*, 2000, p. 3). Reference students mistakenly assume that they "know " the person at the other end of the transaction and treat them as peers. This may lead student assistants into a relaxed and informal conversational style.

Further Rationale in Support of Training Millennials Differently: Politeness Theory

Another theory to incorporate in the training of Millennial students for IM reference is not solely CMC or RUSA guides, but politeness theory that is grounded in a set of skills that dictates social interaction and is a way to measure whether or not all parties' interests are affirmed and attended to. "Brown and Levinson's politeness theory proposes a rational system employed by interactants to calculate the potential threat of an utterance to the self-image and/or sense of autonomy of either the hearer or the speaker (or both) and to make linguistic adjustments in order to mitigate the potential threat while maintaining politeness" (Aldrich and Leibiger, 2009, p. 238). A reference interview is a sound example of a social interaction where autonomy is at risk of potential threat. The encounter revolves around the librarian and patron as they work together to resolve an information need. The librarian gives information about a reference need and the library patron's social interaction is affirmed. However, politeness theory

encompasses more than the mannered etiquette of Emily Post. The theory well known in anthropology, sociolinguistics and linguistics -- is rooted in the dramaturgical theory of Erving Goffmann, particularly relative to the central role of face in interaction. Dramaturgy simply references Goffman's conception of individuals as social 'actors' who concertedly 'perform' (present a public self) on the stage of everyday life. Individuals use linguistic, behavioral, and gestural displays to present a positive self-image ("face") to the social world. They seek to create certain impressions in others, to appear smooth and competent in their role performances, to be perceived as appropriately heedful and supportive of others' performances, and so forth. Face, the positive social value each person effectively claims for him or herself in the public arena is proffered and thus exposed throughout the interaction. Face is the very reflection of self worth, upon this presentation aspect hands individual's self-esteem, self-identity, and the credibility as a member of the social group. (Goffman, E. as cited in Morand and Ocker, 2003, p. 2)

The act of seeking and providing information are potentially face-threatening acts.

(Luo and Yoo, 2007, p. 206). The reference librarian can use politeness strategies to ensure that the "public face," the projected image of the patron, is safe from harm and upheld. This idea mirrors the idea of Constance Mellon's theory of "library anxiety". Saving face means alleviating the concept of Mellon's anxiety provoked due to the interaction with the library. The public face is thus maintained and not disregarded. The tone and communications style of the librarian is one way in which any threat to the patron is reduced.

Below is an example of a lack of intent to save the public face of the patron on the part of the reference provider, again a student.

Transcript Three

[12:08] meeboguest: does permanent reserve mean that it's on hold?

[12:10] wmulibraries: Permanent reserve means that it is behind the circulation desk and it means that you can either have it to use it in the building or that you can only check it out for a certain time period it all depends on the book.

Even though this is a straightforward reference question and the student library assistant answers correctly, this transcript shows that there is no attempt at saving the patron's face or alleviating the patron's fear of the library. Nor is there any formal interaction that engages the patron into a friendly environment. It seems cold and potentially threatening, possibly undermining the patron's sense of self while increasing anxiety. Information is exchanged yet the communication style is lacking politeness. Of course, a direct question with a direct answer may suffice and politeness need not be forced into the conversation. However, the lack of reference interviewing techniques, which should be the gold standard in any reference interaction, should be included.

In a study by Kwon and Gregory (2007) RUSA behaviors and "user satisfaction were found to be higher when librarians performed RUSA behaviors than when they did not" (Kwon and Gregory, 2007, p.144). They mention that five of the ten RUSA behaviors were statistically significant predictors of user satisfaction. One of them was "Listening", being receptive and cordial. (Kwon and Gregory, 2007, p.145) which is directly related to politeness theory, being cordial, open, and welcoming affirms the patron's public face.

When doing real-time reference, students need to play a certain role, that of the reference librarian. Training needs to get this point across. "In interacting, speakers' need to balance a concern for other people's face with a desire to protect their own. Participants in an interaction draw on politeness strategies as a means of paying attention to another person's public face and avoiding 'face-threatening acts': positive politeness strategies involve the expression of friendliness or approval (an example might be explicitly including someone in a conversation); negative politeness strategies involve not imposing on others or threatening their face (an example might be phrasing a request indirectly: 'Could you possibly close the door?')." (Politeness, 2004)

Politeness emphasizes interactional "support words" destined toward others' face. That is, all individuals have face, but 'face wants' – the desire and expectations that others who surround them in interaction will work to affirm and preserve their public persona. In essence politeness means "phrasing things in such a way as to take into consideration the feelings of others (Morand and Ocker, 2003, p. 2).

Therefore, it is the role of the librarian to phrase things in such a way so as not to offend or threaten the patron during a reference interview. This can be challenging since there are no visual or bodily clues to help send the intended message. It happens far too often that a message sent via IM becomes distorted and/or misinterpreted. The casual approach of the student can be construed as threatening the public face, and therefore, impolite.

Recommendations for Training Millennials for IM Reference

The new training policies regarding IM reference procedures were drawn up in the spring of 2009 and were added as a professional development opportunity mid-semester. (Appendix A). The fall class of 2009 was the first incoming group of new student employees who had a special session on IM reference policies and procedures built into their formal training. The training is broken down into three sections.

One:

First and foremost, the level of competency of the student is gauged with a pre-test to see where their strengths and weaknesses lie, not only in reference resources but in reference services as well. Next, the results are reviewed together as a group and then the different areas are prioritized according to comfort level and importance. The next section to be covered is the philosophical grounding of why these policies and procedures need to be in place, where the guidelines come from, and who has established and been using such guidelines.

Two:

Training for IM reference should be done early in the training process, but not before formal instruction has taken place regarding reference philosophy and introduction to the art of the reference interview. When ready for the IM portion of the training, it is suggested to walk the students through the five-part IM procedure. Breaking down the IM reference interaction into smaller steps will make it easier for the student to self-police and see if he or she is reaching all of the benchmarks for a successful IM reference interaction.

Three:

Finally, once the procedures have been introduced and the philosophical background has been explained, the students are asked to practice not with live IM reference but with an assignment that is composed of actual transcripts from previous IM interactions that have been stripped of any identifying information. In the article "IM is for Instant Millennials: Developing Staffing Models and Best Practices for Instant Messaging" by Hodges and Meiman state that while creating and implementing best practices entails establishing agreed-upon competencies, it involves working with the actual output of the IM service: transcripts" (Hodges and Meiman 2009, p. 201). The best way to train is by example, i.e. providing students with several different examples of real-time chat reference transcripts, both good and bad ones. Student trainees use these transcripts in lieu of shadowing, but as a genuine training

assignment. This becomes an assignment that the students complete during their training session and is used. The assignment is to examine transcripts that are incomplete as stated by RUSA guidelines, look for too casual a voice the transcripts and correct them. By correcting the transcripts them, the student must go through and make sure that the tone of the reference chat is appropriate and that the basic elements of the RUSA guidelines and Politeness Theory are followed. Students have room to edit, delete, or add comments to the reference transcript. It is best if they work individually at first initially and then work together in pairs or in groups, fulfilling a Millennial's need to work in groups.

Four:

Allowing the students to work collaboratively will let them share ideas and learn different styles from each other. Once the transcripts have been "corrected" to meet RUSA standards and CMC politeness conventions, the students share their corrections made to the transcripts with each other. The act of sharing ideas ensures that both good and bad ideas have been discussed. as well as giving students a chance to hear of other solutions and ways to improve upon IM service. Students normally walk away from the assignment with a stronger, more complete idea of what a successful IM reference interaction should be. (See appendix C for assignment)

Correcting transcripts to align politeness theory to RUSA guidelines unifies the two goals set in each set of policies straightforward. Politeness theory aligns well with RUSA standard number 3, "Listening/Inquiring." As in transcript 1, where this was lacking, one could add. "Could you tell me more about what sort of information you are looking for?" "Both open-ended and closed-ended questions can be used more extensively than in the face-to-face reference encounters, since questionnaires are used to create and fill in contextual information that is normally part of the visual dimension"(Aldrich and Leibiger, 2009, p. 242).

At the beginning of transcript 1, a simple, "Hi, this is Kate at Waldo Library Central Reference" is enough to demystify the anonymous abyss of IM and satisfy RUSA Standard number 1: "Approachability for creating a meaningful connection to the patron. The patron can now put a name and place to the reference interaction and it

is more approachable.

In transcript 3, it is apparent again that the lack of RUSA guideline 1 of "Listening and Inquiring" is ignored. The lack of listening and inquiring about what sort of information about permanent reserves, the patron needed appeared abrupt and impolite. The lack of politeness could be remedied by adding in such phrases as "It sounds like you need to get a book from permanent reserves. Is that correct? Do I have that right? or do I understand you correctly?" Zhou *et. al.*, recommend that reference interview techniques be employed whenever possible (Zhou, *et. al.*, 2006). Luo says that reference worker need the ability to type in a conversational style, not cold or unfriendly, concise without being rude (Luo, 2007).

As for RUSA standard four "Searching," "librarians often provide running commentaries on their search process. This serves to provide information normally conveyed visually"(Aldrich and Leibiger, 2009, p. 242). As in transcript one, the patron had no idea whether the question he or she asked was being answered. The lack of running commentary on what searches are being done by the student employee appear again as impolite and too informal. This too can be remedied by adding small quips such as "I am still searching." Or "Please be patient while I take a look."

Borin (2001) discusses the difficulties in distinguishing student reference employees from actual reference librarians in face-to-face reference transactions. The problems that arise are that student patrons may not realize that there are more resources available because they are relying on student employees' knowledge which is more often less complete than that of the librarian (Borin, 2001, p. 201). Borin recommends remediating this problem by using the word "Student" on the name badge.

This too can be applied to Millennials handling IM reference. They should clearly indicate that they are a student assistants and clarify that the patron is not speaking to a librarian. This helps the student to "accept the idea that they should not attempt to answer every question they receive and so they are willing to actively ask for help at any stage of the reference process" (Borin, 2001, p. 201).

Since the patron does not know who s/he is conversing with, the same level of linguistic care should be taken and politeness should be maintained throughout the interaction. "The negative and positive face needs of both patrons and librarians remain constant and must be attended to as part of the reference communication" (Aldrich and Liebiger, 2009, p. 242). There should be no apparent differences. Best practices include ongoing hands-on training, constant feedback and review of reference practices and procedures (Neuhaus, 2001). Millennials need to understand the customer service ethic and respect the patron, giving them the high quality of service that they deserve (Luo, 2007).

After reviewing numerous instant message reference transcripts, it became clear that the students were not offering the same level of reference service as they did when observed providing a face-to-face reference interaction. In order to guarantee the same level of quality reference service via IM, Western Michigan University Libraries implemented a policy regarding IM reference and trained the students accordingly. The IM reference policy's ideas are grounded in the RUSA standards for best practices for reference interactions along with politeness theory and CMC. The goals are to make the IM reference service standardized and synchronous with the other reference modalities for which they are trained and so capable of handling.

"We must be aware of how we write what we write, and balance the needs for creating meaningful communication with the need for creating the same awareness of language in our students. One style does not fit all. With writing, context is everything" (Maness, 2008, p. 38). Practical applications of reference interactions need to strike a balance between being too formal and too informal. Maness comments, "too informal genre undermines credibility and a too formal genre inhibits rapport building and communication" (Maness, 2008, p. 31). A review of a recent transcript that has taken place after training and affirms the value of training and practice.

Transcript Four:

[12:28] meeboguest401149: Does the library have a copy of Advertising and Promotion: An Integrated Marketing Communications Perspective; 8th Edition by Belch & Belch?

[12:28] wmulibraries: Hello, this is Courtney at Central Reference. Can I have your

e-mail in case we get disconnected?

[12:29] meeboguest401149: *****@wmich.edu

[12:29] wmulibraries: Okay, is that a textbook for a class?

[12:29] meeboguest401149: Yes, I won't be able to buy the book for about a week or so and don't want to get behind. I thought I'd check to see if there was a copy I could use in the meantime.

[12:30] wmulibraries: Okay, well normally the library doesn't carry textbooks.

However on some occasions we may have earlier editions of the book. I am going to do a quick search and see if an earlier edition is available, just one moment please!

[12:31] meeboguest401149: Alright cool, thanks so much.

[12:33] wmulibraries: Okay it looks like we don't have any editions of that particular book. Your next option would be to do an Interlibrary Loan. However that normally takes about five business days to come in, which wouldn't be helpful if you need it right away.

[12:34] meeboguest401149: Alright well, thanks for your help. I'll send my teacher an email to see where I can go from here. Have a good one!

[12:34] wmulibraries: Okay, sounds good. Is there anything else I can help you with?

Though the above IM reference transaction is relatively short, the student worker was able to employ the RUSA and politeness theory techniques into the conversation. There is evidence of listening, searching, offering alternatives, and a closure.

Conclusion

The objective in developing the IM reference policies was to find a way to strike a balance between the informality of Millennials and chat reference with the formality of the reference interaction. It is a delicate balance, negotiating the virtual space within the parameters of a very formal interaction. With proper training, Millennial assistants eloquently provide the best reference service possible.

Since this study has started, WMU's Central Reference Department switched to LibraryH3lp (<http://libraryh3lp.com/>) from the University of North Carolina-Chapel Hill. It is an integrated web chat platform specifically for libraries that allows

numerous people to log in. Faculty librarians, paraprofessionals and students can all log in simultaneously and monitor the incoming questions. The Central Reference Department has decided to keep the same policy that Millennial employees will be primarily responsible in answering IM questions as they come in, thus emphasizing the need for appropriate training.

Appendix A

IM / Chat Reference Policy and Training Guide

For Western Michigan University Libraries

1. These steps are based on RUSA guidelines for reference interviews
2. The idea is to make the IM service standardized and synchronous with the other reference service points without losing the personal touch and level of public service that the patron expects. The IM patron will get the same level of reference services as in-person, on the telephone or via e-mail.
3. IM is instant but it does not mean that the patron is in a hurry. We have time to slow down. A thorough session that gives them what they need is better than a hasty session where the patron leaves still needing more.
4. Professionalism is *essential*. The communication between you and the patron reflects strongly on the entire WMU community!

There are certain steps you need to follow in IM reference in order to give the patron the best experience possible.

The essentials are as follows and will be explained further.

1. Greet
2. Acknowledgement
3. Triage the question
 - a. Restate the question
 - b. Elicit more information
4. Answer the question
 - a. Cite sources
5. Wrap up

Rule of thumb: Never ever use abbreviations.

One: Greet = Always identify who you are and where you are.

Letting the patron know that you have a name breaks down the barrier of anonymity in virtual reference. Virtual reference is an extension of Waldo Library. Making the connection to the building and to the people makes the chat reference session more personal and more meaningful. They will know that this is an in-house project staffed by people here and not at some random call center.

- Hi, thanks for contacting Ask a Librarian. This is Kate at Waldo Library Central Reference. How can I help you today?

- Hi this is Megan at Waldo Library Central Reference. How are you today?

Tip: Always use the patron's name if the patron identifies him or herself. Many do! Many people access us via their personal chat software. Using their name shows that we are committed to individual service.

Two: Acknowledge = Identify the patron.

Try to find out who the patron is. Are they a student? Faculty? Community? Ask the patron for their e-mail address. Phrase it like something like this:

- Can I get your e-mail address in case we get disconnected?
- May I have your e-mail address in case I find information after we disconnect?
- You can also add something about the phone number.
- Our phone number at the desk is 387-5178 in case we get disconnected.

Three: Triage the question.

Always restate the question and try to elicit more information if necessary

This step helps us buy some time and also make sure we clearly understand what the patron is looking for. It sounds repetitive, but it does offer more insight into the question at hand.

- It looks like you are trying to find information on...X .
- You need examples of the MLA citation style...is this for footnotes or endnotes?
- Do I have that right?
- Is that correct?
- Does that sound right?

Always try to elicit more information about the assignment or why the patron is looking for information.

This is the meat of the reference interview process where we try to find out as much about the patron and why they need the information they are looking for. If we do not clarify this, we risk giving them the wrong type of information.

This step also involves a certain level of triage. If the patron is asking for information on how to cite a reference, you may not need to ask for more on the assignment. But if you get a question about how to find an article you can ask the patron what class this is for, when the assignment is due, etc...this helps us identify how much information and how fast they want the information. Do they need an article in full-text?

There is a lot of room here to ask questions to try and figure out who the patron is. Is it a faculty member? Student? Our answers will change based on who the patron

is.

- It sounds like you need help with locating some articles on human rights.

What class and assignment is this for? This will help me point you to the best resources and information for you.

You can cut and paste URLs to the different sources of information to help the patron locate where you are finding the information.

Treat each session as a mini information-literacy session. Take the time to teach the patron about the resources rather than just give the answer. Our goal is to make them independent researchers.

Let them know where you are on the library Web page and give them the link (obviously not for databases). If you are looking for a book in the catalog, let them know that is where you are searching and why.

Four: Answer the question = Answer the question!

Always ask a patron if they got the answer they needed

We sometimes think we have given the patron the answers they are looking for. But let them be the judge. Ask them.

- Does this completely answer your question?
- Do you need some more information on this?
- Do you have everything you need to get you started?

Five: Wrap up the session = Give a closing statement!

This can be open an open-ended question

Closing the session is not the same thing as hanging up a session. Closing a session means you give the patron one question or sentence that concludes the reference interview. Many patrons are hesitant to ask more questions thinking they are taking up our time. Give them the opportunity to ask more questions.

- Is there anything else I can help you with today?
- Is there anything else I can do for you today?
- Would you like a follow-up e-mail which includes a transcript of this session? (very popular particularly with the lengthier BI type chats)
- Thanks for using Ask a Librarian. Please contact us again if you need further help.
- Bye. Have a great day!
- Stay warm!
- Good luck with the assignment.

Tip: If you do not hear from the patron after a minute or two of the last transaction, send out a beacon question to see if they are still there.

- I have not heard from you in awhile. Are you still on the line?

And if the patron answers and says something to the effect that they do not need more help, let them close the session. Do not hang up on the patron.

Appendix B.

Cheat Sheet for IM Reference

At the computer where we have our Meebo client loaded, we have posted a cheat sheet to help the student stay on the right track during the reference interview. It is a way to help prompt them in case they get stuck.

Remember to greet and acknowledge the patron the patron:

- Hi, thanks for contacting Ask a Librarian. How can I help you today?
- My name is at Waldo Central Reference. How can I help you?
- Can I get your e-mail address in case we get disconnected?

Triage and clarify the question.

- It sounds like you need help finding
- Is that right?
- Do I understand that correctly?
- Am I leaving anything out?

Reference Interview:

- Are you just now beginning or have you already tried a few searches?
- Can you tell me which class this is for?
- Is this for an assignment? For which class?
- This will help me get the best information and resources for you.
- Could you give me a few more details about the kind of information you want?

Transfer:

- I am going to refer you to the subject specialist. His/her name is and the contact information is...

Closure:

- Is there anything else I can help you with today?
- Would you like an e-mail that includes a transcript of this session?
- Please contact us again if you need further help.
- Good luck with the assignment.
- Have a great day.
- Bye!
- You can also contact us by e-mail, phone or in person.

Referral to an expert in the library:

- If you don't find what you are looking for, please come back and we'll try something else.
- I hope this answers your question.
- I hope this information is helpful to you

Appendix B Read Scale:

READ (Reference Effort Assessment Data) Scale© used for libstats

Scale	Description	Examples

#1	<ul style="list-style-type: none"> ▪ Less than 1 minute ▪ No specialized knowledge, skills or expertise ▪ No consultation of resources ▪ Point people to places ▪ Refer to another department 	<ul style="list-style-type: none"> ▪ Location of copiers, printers, and other equipment ▪ Location of services ▪ Giving user stapler, etc. ▪ Library hours
#2	<ul style="list-style-type: none"> ▪ Less than 5 minutes ▪ Requires minimal library knowledge, skills or expertise ▪ May consult our Library catalog 	<ul style="list-style-type: none"> ▪ Finding a book ▪ Locating a call number ▪ How to print ▪ How to use the copier ▪ Library policies ▪ Minor computer, etc. help
#3	<ul style="list-style-type: none"> ▪ 5 to 15 minutes - requires some effort ▪ May consult the catalog, a database or book ▪ May include instruction of the user ▪ Reference knowledge and skills come into play 	<ul style="list-style-type: none"> ▪ Finding books OR articles on a topic ▪ Using specific reference resources ▪ Teaching basic searching ▪ Searching a relevant subject database ▪ Assisting with technical problems
#4	<ul style="list-style-type: none"> ▪ 15-45 minutes – more effort ▪ May consult multiple sources ▪ Subject specialists may need to be consulted ▪ Reference knowledge and skills needed ▪ Teach more in-depth research skills 	<ul style="list-style-type: none"> ▪ Finding books AND articles on topic ▪ Advanced search techniques ▪ Helping define or clarify a topic ▪ Referring to other services or departments (ILL, Gov Docs)
#5	<ul style="list-style-type: none"> ▪ 45-75 minutes - substantial effort ▪ Subject specialists may need to be consulted ▪ Consultation appointments ▪ User and librarian work cooperatively ▪ Multiple resources used ▪ Less well know resources used 	<ul style="list-style-type: none"> ▪ WRAP sessions (even unplanned) ▪ In-depth faculty and grad student research ▪ Esoteric sources for non-WMU users ▪ Creating bibliographies ▪ Working with other libraries
#6	<ul style="list-style-type: none"> ▪ 75 minutes plus, may go into several days ▪ Requests for information can't be answered on the spot ▪ In-depth research and services for users ▪ May involve photocopying, microfilm printing, mailing documents ▪ May involve contacting others outside 	<ul style="list-style-type: none"> ▪ WRAP sessions (even unplanned) ▪ In-depth faculty and grad student research ▪ Esoteric sources for non-WMU users ▪ Creating bibliographies ▪ Working with other libraries

Based on the READ Scale (Reference Effort Assessment Scale) © Bella Karr Gerlich - This work is also licensed under a Creative Commons Attribution-Noncommercial-No Derivative Works 3.0 Unreported License.

Appendix C: IM Transcript exercise for training student reference employees
Transcript One:

[16:29] meeboguest575335: how can i get access to financial websites through the library?

[16:30] meeboguest575335: hello

[16:31] wmulibraries: Sorry, we are looking into it

[16:31] meeboguest575335: ok thanks

[16:32] wmulibraries: Are you looking for databases with access to financial topics?

[16:32] meeboguest575335: something like moody's or dnb or other financial websites

[16:33] meeboguest575335: I was told by a teacher that the library had some subscriptions

[16:35] wmulibraries: Ok, we do have Moody's, which is now called Mergent. From our main library webpage, there is a tab that says "research." Click on that, then select subject guides.

[16:35] wmulibraries: In that list, there is a subject guide for business

[16:36] wmulibraries: Then, select "Company Information." Then you can scroll down to Mergent Online

[16:36] meeboguest575335: thank you

[16:37] wmulibraries: You're welcome. If you need anything else, just let us know!

Transcript Two:

[10:13] meeboguest80291: Does the Waldo Library have the book "All Around the Town?"

[10:13] meeboguest80291: Or any Mary Higgins Clark books?

[10:13] wmulibraries: Just a moment while I check.

[10:14] wmulibraries: Sure, we do have that title, and 24 others written by her.

[10:14] meeboguest80291: Where can I find them?

[10:14] wmulibraries: The call number for all around the town is "PS3553.L287 A76 1993"

[10:15] meeboguest80291: What floor should I be on

[10:15] wmulibraries: Most of her other books will be close to that call number, too. It's on the main floor, near the back.

[10:16] meeboguest80291: Thank You so much. This was very helpful.

Transcript Three:

[12:08] meeboguest989569: does permanent reserve mean that it's on hold?

[12:10] wmulibraries: Permanent Reserve means that it is behind the circulation desk, and it means that you can either have to use it in the building, or that you can only check it out for a certain time period. It all depends on the book.

Transcript Four:

[11:55] meeboguest483135: hi, I'

[11:55] wmulibraries: Hello

[11:55] meeboguest483135: *I'm looking at ABI inform and having some trouble

[11:55] wmulibraries: Ok

[11:55] wmulibraries: What kind of trouble

[11:56] wmulibraries: ?

[11:56] meeboguest483135: I'm looking at multiple a number of business journals and I can get the summary of this one particular article to come up, but it's not showing the full text.

[11:57] wmulibraries: Ok, what you need to do is find the 'find it at WMU' link

[11:57] meeboguest483135: the document ID is 277079

[11:57] meeboguest483135: ok

[11:57] meeboguest483135: I dont know where to find that link

[11:58] wmulibraries: When you click on the title and read the summary, look to the right hand side of the page

[11:58] wmulibraries: it's a brown highlighted link

[11:59] wmulibraries: Does that help?

[11:59] wmulibraries: And when you click on it, it says we don't have full text online, but we do have a print version here in the library

[11:59] meeboguest483135: i'm getting there

[12:00] wmulibraries: ok

[12:00] meeboguest483135: ok i found it. thank you

[12:01] meeboguest483135: so i have to come in and print it at the library

[12:01] meeboguest483135: ?

[12:01] wmulibraries: No problem! And yes, unfortunately you'll have to come in

[12:02] meeboguest483135: alright, thanks for your help.

[12:02] wmulibraries: You're welcome.

Transcript Five

[10:34] meeboguest542196: i am trying to find an article about the media influences binge drinking or underage drinking. on westcat online. i need a source from western. but it lists topics for you here and known are what i need and i cant figure out how to search this

[10:34] wmulibraries: Well WesCat is our catalog for the items we have in print.

[10:35] meeboguest542196: oh...

[10:35] meeboguest542196: so youre saying i have to come in there?

[10:35] wmulibraries: What you can do is from the wmich.edu/library site, click on the tab that says "databases A -Z"

[10:35] wmulibraries: then go to the link that says "databases by subject"

[10:36] wmulibraries: from there you can choose the topic you'd like to look into. You can probably search in general info, or you can...

[10:36] meeboguest542196: would this be easier for me if i came in here to the library

[10:37] wmulibraries: If you'd like us to help you search, then yes. Come to the reference desk at the library.

[10:37] meeboguest542196: than you

[10:37] wmulibraries: you're welcome.

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