Instant Messaging
Reference by Students

By Kate Langan, Central Reference

At Western Michigan University Libraries, virtual reference service, sometimes called chat reference, has been offered via Instant Messaging (IM) by using Meebo, a free online instant messaging program. IM reference service started in the summer of 2008 when a Meebo widget was embedded into the Libraries’ homepage found at www.wmich.edu/library. Patrons can use the IM link to connect directly to a library staff member. The computer where the Meebo client is logged in is adjacent to the main reference desk, and, from the initiation of the service, a student assistant has been assigned to be the “first responder.” Seated nearby, at the main desk, are one or two professional staff members. The decision to staff the IM system with students was deliberate in that it was originally argued that the “chat” interchange was a commonplace skill among students. Furthermore, the close proximity of professionals would provide skilled assistance when needed.

As a result of the staff and physical configuration, the reference data on chat reference for the spring semester of 2010 were not at all surprising: students handled almost 84% of all instant messaging transactions. Librarians answered only 8% and the remaining 8% were answered by paraprofessionals. These numbers are not a bad thing in and of themselves and do not indicate poor reference service. However, what the numbers do suggest is that we need to be sure that the training of our student reference employees on how to handle IM reference questions is effective. Their reference interactions determine how users view the Libraries’ use of chat. Are we providing quality reference through this medium?

Background: Hiring for Central Reference student employees takes place in the late summer and new hires start their employment at the beginning of the fall semester. These students undergo an extensive twelve-week training process during the first semester of their employment. The main goal of the process is to have the students learn the intricacies of working in the Central Reference department with special emphasis on answering patron inquiries. Each week, for approximately two hours, the new Central Reference student assistants learn the fundamentals of reference work including the philosophy of reference service, guidelines for the reference interaction, the best print and electronic reference resources in different subjects, and have physical tours of different parts of the WMU library system.

The student employee is also introduced to the idea that reference service is a type of customer service, the same type of service one would expect in a store between customer and employee. In other words, reference service is characterized by reliability, responsiveness, helpfulness, and user satisfaction. Equally important, in an academic library setting, is the responsibility of the library staff to assist the customer/patrons in the development of their personal information literacy, i.e., “to locate, evaluate, and use effectively the needed information” (ALA). The ultimate intent of the training process is for these new reference students to learn how to provide “good” service using RUSA (Reference and User Services Association, American Library Association) guidelines (http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesbehavioral.cfm). The study described below provides preliminary evidence that this learning occurs when the training is based on professional reference standards applied to the IM medium of reference service.

The Problem Redefined. As noted, the first student training session is devoted to the philosophy of reference service and to the importance of the reference interview process. As I watched the new students respond to the presentation, another, more focused question emerged. Are our student employees making the connection that reference service principles should also be used in an Instant Messaging interaction? As noted earlier, these students answer the vast majority of IM reference questions that come to Central Reference. Are they providing good service? Needing actual data to answer that question, it was essential to do a review and content analysis of transcripts of questions already completed through IM. That analysis provided evidence that our reference students, when in the informal chat mode, did not utilize RUSA standards. From that documentation came an obvious conclusion. Special attention must be given during training sessions to the incorporation of the RUSA behavioral guidelines as key to successful IM as to any other mode of reference inquiry. Moreover, the millennial learning characteristics of the student trainees need to be understood and integrated into the training process.

Millennial Students: Workers and Users. Many of our student workers now belong to the millennial generation (also called Nexgen or Generation Y), those born roughly between 1982 and 2002. Therefore, they will be coming through the ranks at the University level for at least another decade. It is relevant that we know how to best reach them through training as information professionals.

Current theory and practice suggest that the most successful way to reach these millennial reference employees is not only to give them the HOW of performing appropriately with technology for a reference interaction, but also provide them the WHY. Other factors also come into play:

• While training students, supervising librarians also need to remember that the students are adults, albeit young adults.
• They want to be entertained as they learn.
• They expect a certain level of personal challenge, but work best in teams or in pairs.
• Sufficient time needs to be allotted for orientation. Orientation should have shorter modules, test and review often, and be fun.
• Assignments should be appropriate and meaningful, not wasting the student assistants’ time: team or collaborative efforts and assignments are preferred.
• They want their opinions to be heard because they have the expectation that their opinions matter.

Millennials will respond best to an orientation program that is hands-on and moves at a rapid pace.
• Incorporating some computer-based instruction allows students to go at their own speed and acknowledges their ability to manage information.

Results. Based on the analysis of the IM transcripts and the knowledge of the millennial characteristics of new student

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

Steps 1 & 2: Training for IM reference was initiated early in the twelve-week course, but not before formal instruction has taken place regarding reference philosophy of service and the reference interview. When ready for the IM portion of the training, the process is to walk the students through the five-part IM procedure. Breaking down the IM reference interaction into smaller steps makes it easier for the student to self-police and see if he or she is hitting all of the benchmarks for a successful IM reference interaction.

Step 3: Once the procedures have been introduced and the philosophical background has been explained, the students then practice, not with live IM reference interactions, but with assigned actual transcripts from archived IM sessions. Students are given several different examples of chat reference transcripts, both good and bad ones. Student trainees will use these transcripts in lieu of shadowing, but also as an actual training assignment.

The assignment is to go through the transcripts and correct them. By correcting, the student must review 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 being followed. Students can edit, delete or add comments to the reference transcript. Usually, they work individually and then together in pairs fulfilling an inherent need to work in groups. Also, working collaboratively will let them share ideas and learn different styles from each other. The students share their transcripts with each other, which ensures that both good and bad ideas have had a shared discussion. Students should walk away from the assignment with a stronger, more complete idea of what a successful IM reference interaction should be.

Conclusion. In order to guarantee the same level of quality reference service via IM as in person or through e-mail, the Western Michigan University Libraries implemented a special policy regarding IM reference and trained the students accordingly. Among other outcomes was a revised reference training manual that is distributed to new students. The IM/Chat Reference Policy and Training Guide can be accessed online in the Libraries. Contact kate.langan@wmich.edu for additional information.

The new IM reference guidelines:
- are grounded in the RUSA (Reference and User Services Association, American Library Association) standards for best practices for reference interactions;
- incorporate politeness theory, that is, strengthen skills that facilitate social interaction and affirm that all parties’ interests are addressed in the reference encounter;
- support valid responses, but IM does not mean that the patron or staff member is in a hurry. We have time to slow down. A thorough session that gives users what they need is better than a hasty session where the patron exits the system still needing information; and
- identify and respond to the intricacies of computer-mediated communication while also keeping in mind generational preferences of the current student reference assistant.