



KnowItNow24x7 Provider Handbook

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Section I. Introduction

I.A. Introduction. KnowItNow24x7 (KIN24x7) unites the information expertise of Librarians; the comprehensive resources of Ohio's public, college, and university libraries (and several special libraries); and advanced technology to allow every resident in the state of Ohio the ability to get answers to questions through a 24/7 online reference service available from any device with an Internet connection.

I.B. Background. KnowItNow24x7 was inaugurated in 2001 as the world's first 24/7 online reference service. At that time, it was confined to Northeast Ohio within the CLEVNET consortium headed by Cleveland Public Library (CPL). Starting in 2004, the service went statewide as a collaboration of CPL, Northeast Ohio Library Association (now known as Northeast Ohio Regional Library System (NEO-RLS)), and Cuyahoga County Public Library. The statewide service was, and continues to be, funded by an annually-renewable Library Services and Technology Act (LSTA) grant from the Institute of Museum and Library Services (IMLS) awarded by the State Library of Ohio. In 2007, administrative responsibilities were consolidated under Cleveland Public Library and, in 2008, a Statewide Coordinator was hired to facilitate the service. NEO-RLS serves as a sub-contractor to CPL and administers the after-hours services known as KIN24x7 AfterDark. Librarians around the state staff the service during regular library hours.

I.B.1. Until Jan. 1, 2010, KnowItNow24x7 included four separate portals:

I.B.1.a. KnowItNow24x7 at <http://www.knowitnow.org> (ALL residents of Ohio)

I.B.1.b. HomeworkNow at <http://www.homeworknow.org> (primarily for middle/secondary students)

I.B.1.c. ReadThisNow at <http://www.readthisnow.org> (reading recommendations)

I.B.1.d. KnowItNow Academic at <http://academic.knowitnow.org> primarily (OhioLINK students)

I.B.2. All these web sites were maintained by the KIN24x7 Web Services Coordinator stationed at Cleveland Public Library.

I.B.3. On Jan. 1, 2010, all general public web portals were consolidated into one service, KnowItNow24x7, at one address, <http://www.knowitnow.org>. A new logo was also designed by Kristin Klatka of Euclid Public Library as part of a statewide design contest.

I.B.3.a. KnowItNow Academic at <http://academic.knowitnow.org> continues to serve the OhioLINK community.

I.C. Definitions.

I.C.1. Agent: Any staff member of a library or institution that answers questions as part of the KIN24x7 network whether through chat, IM, or email. Synonyms for Agent include Librarian and Provider.

I.C.2. SparkRef: Software platform used to provide the "live"/synchronous online reference service.

I.C.3. Provider: Used both as a synonym of "Agent" (I.C.1.) and as a description of libraries and institutions in which Agents work.

I.C.4. Transfer: The act of sending a Patron to another subject queue while online with him or her in real time or to an outside agency. See **III.G.3.**

I.C.5. Patron: The Ohio resident/citizen who has initiated a request for information. Another synonym for Patron is Customer.

I.C.6. Transcript: The text of the conversation between Agent and Patron including web sites shared.

I.D. Service Model. KnowItNow24x7 attempts as much as possible to take advantage of the expertise of Agents and the resources of provider institutions.

I.D.1. KIN24x7 may transfer or refer Patrons to:

I.D.1.a. Cleveland Law Library – Available 9 am – 4:30 pm weekdays (Only for Patrons in the following Northeast Ohio counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, Summit, Wayne)

I.D.1.b. First Call for Help – Available 9:00 am – 5:00 pm weekdays (Only for Patrons in Cuyahoga County)

I.D.1.c. Career and Job Info – Available 9 am – 5:30 pm Monday-Saturday (Only for Patrons in Cuyahoga County and staffed by Cuyahoga County Public Library)

I.D.1.d. Local library queues for location-specific information

I.E. Clientele. As the recipient of an LSTA grant from the State Library of Ohio, KnowItNow24x7 serves all residents and citizens of Ohio.

I.F. Disclaimer. KIN24x7 provides timely, authoritative answers to factual questions and guidance in conducting personal research using the World Wide Web, statewide databases, and Patrons’ local libraries’ collections. Every effort is made to provide accurate information; however, provider institutions do not control the content of resources used. Patrons agree to hold the provider institutions and KIN24x7 harmless from any claims, losses, damages, obligations, or liabilities relating to the use of information obtained from this service. The provision of any factual information or materials, and the identification of other web sites that may be useful in obtaining additional information regarding legal or medical issues cannot be construed as advice. Only a professional practitioner can provide specific advice and direction in resolving legal and/or medical issues. (See **VI.E.2.**)

I.G. Copyright. The Copyright Law of the United States (*United States Code*, Title 17) governs the reproduction, distribution, adaptation, public performance, and public display of copyrighted material. Responsibility for any possible copyright infringement lies solely with the Patron; provider institutions disclaim any responsibility or liability resulting thereof.

I.H. Privacy. Information collected about any individual using this service is generally incidental to the technical operation of the system. Such information will not be voluntarily published or shared with any other entity. Below is a description of what information is requested and how it is used.

I.H.1. Zip code: The number of sessions for each zip code is tabulated for statistical reporting. This information will only be used to gauge the reach of this service or provide better service for the Patron.

I.H.2. Name: Input of a name is not required for use of the service. Name is used by the software to identify a session and in communicating with the Patron.

I.H.3. Email address: The entry of an email address is not required to use this service. If one is provided, it will be used only in the provision of service. No email addresses will be sold or given to any other entities. The provider institutions may use the email address to:

I.H.3.a. Send a transcript of the session for Patron's reference

I.H.3.b. Send a scanned document at a later time

I.H.3.c. Follow-up on an incomplete session

I.H.4. In the course of clarifying the request for information, the Agent may ask for information regarding purpose (e.g., “Is this for a homework assignment?”) or grade level. Such incidental information will be used to identify appropriate resources only. Any information given to the Agent will be stored in a session transcript.

I.H.4.a. If a Patron provides an email within a session, it can only be used for the purposes outlined above.

I.H.5. See also sections **VI.F. Patron Privacy** and **VI.G. Librarian Privacy**.

Section II. Communications

II. The following resources are available to all KIN24x7 Agents and provider institutions for current awareness of important information related to offering KIN24x7 service. Several of these media are also publicly available to non-Agents and non-provider institutions.

II.A. KIN24x7 Provider Web Site. The KIN24x7 Provider web site at <http://provider.knowitnow.org> is publicly available. Information on this page includes announcements, news, newsletters, forums, training and marketing materials, directory of provider libraries, coverage schedule, documentation, and statistics.

II.A.1. Some portions of the KIN24x7 Provider site are accessible only by authorized users (i.e., KIN24x7 Agents, administrators, etc.) for security reasons.

II.A.2. KIN24x7 Agents can request an account by clicking *Create An Account* on the Provider homepage.

II.A.3. Some portions of Provider site are *only* available to registered users (e.g., Database Access Information, Pathfinders, and Contact Information).

II.B. KIN24x7 Newsletters. Three "newsletters" are available for email subscription through each KIN24x7 Provider Site account.

II.B.1. A monthly newsletter with information pertinent to both providers and the general public.

II.B.2. An updates and alert newsletter which includes breaking news and other information pertinent to providers.

II.B.3. A tech news newsletter with information for IT staff and others who are responsible for installing or maintaining the SparkRef/Openfire software at provider libraries.

II.B.4. It is recommended that all providers subscribe to at least the first and second, with IT staff encouraged to sign-up for the last.

II.B.5. If a non-provider would like to subscribe to the monthly newsletter, he or she may email support@knowitnow.org and request that their email address be added to the subscription list.

II.D. Instant Messaging. The SparkRef software allows each KIN24x7 Agent to send instant messages (IM's) to any other Agent or KIN24x7 staff. IM'ing other KIN24x7 Agents can be useful for sharing information as well as requesting "back-up" on a Patron's question. The SparkRef IM feature is not to be used for non-library-related chatting.

II.D.1. It is suggested that KIN24x7 Agents login to the SparkRef software to be available throughout their day to receive IM messages from the KIN24x7 Coordinator, KIN24x7 Tech Support, and KIN24x7 Agents.

II.D.1.a. Agents can log out of Fastpath if it is not time for their regularly scheduled KIN24x7 shift, but still be available to receive IM's.

II.E. Broadcast Instant Messages. This feature of the SparkRef software allows both KIN24x7 staff and individual Agents to send messages to everyone (or a subset of users) with a SparkRef account simultaneously. KIN24x7 staff will use this to alert Agents to important, time-sensitive information as well as other pertinent announcements.

II.E.1. Agents may use the broadcast feature to send helpful information to other agents as well as to ask for help with a problem. See **Section 8.3.2.** of the *KnowItNow24x7 Software Training & Reference Manual* (available at <http://provider.knowitnow.org/content/documentation>) for procedures on sending broadcasts.

II.F. KIN24x7 Email Accounts: Each provider institution has the opportunity to be provided with an e-mail account from which KIN24x7 Agents may follow-up with Patrons. The account can be accessed by clicking on the *KIN email* link on the Provider Page. Do not use this email account for personal correspondence.

II.F.1. If an agent is unsure of their access information for their KIN24x7 email account, contact support@knowitnow.org.

Section III. Service Guidelines: Live (Synchronous) KIN24x7 Virtual Reference Service

III.A. Monitoring Shifts. Agents are responsible for logging on and taking calls during their scheduled shifts.

III.A.1. If it is not possible to cover a shift, immediately contact one of the following:

III.A.1.a. The KIN24x7 Coordinator if you are a daytime or early evening Agent.

III.A.1.b. AfterDark Supervisor if an AfterDark Agent.

III.A.1.c. OhioLINK Liaison if a KnowItNow Academic Agent.

III.A.1.c.i. OhioLINK Agents also "swap" coverage times via their own listserv.

III.A.2. Agents should be ready to accept questions at the moment their shift starts

III.A.3. Agents should monitor patron sessions until the end of their shift.

III.A.4. If the Agents on the next shift do not log on, or if a scheduled Agent on your shift is not logged on, contact the appropriate person outlined above in **III.A.1**.

III.A.4.a. See **Schedule** posted on Provider Page at <http://provider.knowitnow.org> for assignments for daytime and evening public library, and KnowItNow Academic OHIOlink library shifts.

III.A.4.b. Contact AfterDark Supervisor or OhioLINK Liaison with questions on schedules for those services.

III.A.5. It is **recommended** that a staff person directly monitor a computer for incoming questions.

III.A.5.a. This can be in conjunction with other duties or as the designated KIN24x7 Agent for a particular shift.

III.A.5.a.i. Staffing KnowItNow24x7 from the reference desk can be problematic and is not recommended although it is sometimes necessary.

III.A.5.b. Staffing KnowItNow24x7 from a location removed from in-person reference is the **optimum** situation.

III.A.5.c. It is **not recommended** to have the computer being used to monitor KIN24x7 questions removed from the direct reference desk area if staff members monitor BOTH in-person and virtual Patrons. This situation can set up difficulties in the following situations:

III.A.5.c.i. Picking up incoming calls directly from Patrons

III.A.5.c.ii. Answering IM's from other Agents

III.A.5.c.iii. Being alerted to Broadcast IMs from KIN24x7 staff with important, time-dependent information.

III.A.6. Those institutions monitoring **local KIN24x7 queues** commit to staffing their service during all regular open hours of their individual institutions.

III.B. Picking up Patron calls

III.B.1. Agents will work with up to a *maximum* of four Patrons at a time.

III.B.1.a. **Four** Patrons is a maximum, *not* a minimum number of sessions.

III.B.1.b. Every effort should be made to be as efficient and courteous as possible to keep question traffic flowing.

III.B.2. Agents must pick up calls within 20 seconds or they will be routed to the next Agent in their queue.

III.B.3. Agents are expected to use professionalism with every Patron as per **RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers** (See **Section III.I** and **Appendix II**).

III.B.4. Agents are expected to work with more than one Patron at a time when queue traffic warrants this.

III.B.4.a. It is acceptable (and encouraged) to pick up multiple Patrons and inform each one that the Agent is currently working with someone else and the Patron's question will be answered as soon as possible. Thanking the Patron for holding is encouraged as common courtesy.

III.B.4.b. If an Agent receives the same Patron alert multiple times, they are expected to pick up the call and handle it as in **III.B.4.a**.

III.B.4.c. The KIN24x7 service model relies on every Agent equitably sharing in the question load during his or her shift.

III.C. Offline follow-up

III.C.1. KnowItNow24x7 Librarians should determine when it is appropriate to follow-up on a question after a patron leaves the live session. Such reasons may be:

III.C.1.a. Resources for answering the question are not immediately available online, but can be accessed after the session.

III.C.1.b. The Agent is unable to find information during the session, but is confident that he or she could find information given more time (i.e., within 15-20 minutes).

III.C.1.c. Technical problems with either the Agent's or Patron's software/hardware/connection that interfered with completing a regular transaction.

III.C.1.d. The Patron disconnects from a session before the Agent sends information.

III.C.2. Librarians should obtain or confirm Patron contact information and indicate when follow-up information will be sent.

III.C.3. Agents should select the Call Resolution Code of "Follow-up" for these situations (**III.G.2.**).

III.C.4. Offline follow-up with Oregon Patrons

III.C.4.a. The Coordinator for Oregon's L-net service has requested that any follow-up for Oregon patrons be done by Oregon librarians.

III.C.4.b. If offline follow-up is required for an Oregon Patron, the KIN24x7 agent should let the person know that someone will be following-up with him or her by email.

III.C.4.c. The KIN24x7 Agent should VERIFY Patron's email address.

III.C.4.d. Politely End the Conversation using the End Conversation icon.

III.C.4.e. Choose "Follow-up" as Resolution Code.

III.C.4.e.1. This code will automatically route the question to Oregon's database for offline follow-ups. An Oregon librarian will be assigned the question to follow-up with the Patron.

III.C.4.f. This **DOES NOT** mean that EVERY Oregon question should be coded as "Follow-up"! This is ONLY for questions that require some sort of offline referral or follow-up with an Oregon Patron.

III.C.4.g. If there are ANY questions about this procedure, contact the KIN24x7 Coordinator.

III.D. Referring the call to an outside agency

III.D.1. KnowItNow24x7 Librarians should determine when it is appropriate to refer a Patron to an outside agency. Such reasons may be that the Patron's question:

III.D.1.a. Requires response from the Patron's home library (eg, account info, fines, renewals, etc.)

III.D.1.a.i. Patron's with these types of requests may be transferred to their library's Local Queue IF that library staffs a local service on KIN24x7 during regular hours.

III.D.1.b. Requires *extensive* in-library research using only locally available resources (e.g., local history)

III.D.1.c. Is most efficiently answered by another agency

III.D.2. Librarians should select an appropriate agency to which to refer the Patron and provide the Patron with contact information, such as e-mail address, postal address, phone number, and/or website URL.

III.D.3. Librarians should select the Call Resolution Code of "Transferred" for these situations (**III.G.3.**).

III.E. Transferring the call to another KIN24x7 queue

III.E1. Librarians may sometimes determine that it is appropriate to transfer a Patron to another queue or to conference-in another Agent. Such reasons may be:

III.E.1.c. the question requires response from the Patron's home library (eg, account info, fines, renewals, etc.)

III.E.1.c.i. Patron's with these types of requests may be transferred to their library's Local Queue IF that library staffs a local service on KIN24x7 during regular hours.

III.E.2. Librarians should always transfer Patrons to a KIN24x7 Queue and NOT to a specific Librarian.

III.E.3. When a call is transferred, the original Librarian's session will automatically close *after* the next Librarian has accepted the call.

III.E.3.a. Agents are encouraged to stay on-the-line until the next Agent picks up the transfer.

III.E.3.b. Resolution Codes will display before the desired Queue is chosen. This is normal.

III.E.3.c. Choose the resolution code of "Transferred" for these situations (**III.G.3.**).

III.E.4. If a question falls outside of an Agent's immediate subject discipline/queue BUT the Agent is able to ascertain that the question can be easily and quickly answered AND the Agent is able to confidently answer the question himself or herself, it is not required for the Agent to transfer the question.

III.E.5. KIN24x7 may transfer or refer Patrons to the following queues as of June 1, 2010:

III.E.5.a. Cleveland Law Library – Available 9 am – 4:30 pm weekdays (Only for Patrons in the following Northeast Ohio counties: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, Summit, Wayne)

III.E.5.b. First Call for Help – Available 9:00 am – 5:00 pm weekdays (Only for Patrons in Cuyahoga County)

III.E.5.c. Career and Job Info – Available 9 am – 5:30 pm Monday-Saturday (Only for Patrons in Cuyahoga County and staffed by Cuyahoga County Public Library)

III.E.5.d. Local library queues for location-specific information

III.F. Ending Sessions

III.F.1. Session Length

III.F.1.a. Sessions must always be ended in a courteous manner. Patrons should *never* be told that they have asked their limit of questions or that their "time is up." (However, see III.F.2. below.) The addition of a "Thank you for using our service"-type of message is highly recommended for all conversations.

III.F.1.b. A session shall be brought to a close when either:

III.F.1.b.i. the Patron indicates that he or she has the information sought

III.F.1.b.ii. the Librarian has been assured that the Patron is able to either search independently for the information or find information through reading resources sent.

III.F.1.c. There is no "optimum" session length. Agents and Patrons must determine the necessary length of a session between them to resolve the Patron's information needs.

III.F.1.c.i. According to a study from 2007 by Marie Radford and Lynn Connaway, the mean session duration for virtual reference transactions for public library virtual reference services was 13.68 minutes.

III.F.1.c.ii. PowerPoint of study is available at www.oclc.org/research/projects/synchronicity/ppt/alise07.ppt

III.F.2. When a Patron has a long list of questions or continues to demand more information, the Librarian may politely inform the Patron that there are other Patrons waiting for assistance (if there are) and encourage the Patron to log back on later.

III.F.2.a. In these situations, it is encouraged to give the Patron enough information, appropriate resources, or instruction to work on the list of questions (if they are similar) and then encourage him or her to log back on later if there are additional questions.

III.F.2.a.i. For example, if a Patron is asking for definitions of a long list of words, show him or her how to use an easily-accessible authoritative online dictionary and encourage the Patron to log back on later if there are additional questions.

III.F.3. If a Librarian does not receive a message from a Patron for 2 – 3 minutes, it is acceptable to ask if the Patron is still online.

III.F.3.a. If there is no response within 1 – 2 additional minutes, the Librarian should send a message that he or she has not heard from the Patron for a few minutes, and is going to disconnect and welcome the Patron to sign on again if he or she needs further help.

III.G. Call Resolution Codes

III.G.1. **Completed:** Use this code when authoritative and complete information has been sent to the Patron in order to answer a question. Also choose "Complete" when a Patron disconnects before the clear end of session, but the Librarian has sent information that will answer the question and the Patron will receive in his or her chat window and transcript (*if* a Patron email address was provided). For conversations that have been completed with no follow-up or other action needing to be taken, choose "Complete."

III.G.2. **Follow-up:** Use this code when the Librarian could not find information during the session but will continue searching and follow-up with the Patron via phone, fax, email, etc., after the session. Extensive offline

searching time is not recommended. Follow-up should only take place if the Librarian is able to respond to the Patron within a reasonable amount of time following the online conversation.

III.G.3. **Transferred:** For conversations that have been transferred either to another agency or institution, the Librarian should choose "Transferred." (See Sections III.D. and III.E. above)

III.G.4. **Disconnected:** Use this code when the Patron is disconnected after the Librarian picks up the call, disconnects immediately after signing on, or before the Librarian can send any information. In other words, for conversations that were disconnected prematurely or lost due to technical difficulties, choose "Disconnected."

III.G.5. **Prank:** Use this code when the Patron persists in asking inappropriate questions for the service or behaves inappropriately during the call, causing the Librarian to disconnect the Patron before finishing the session.

III.G.5.a. Agents should use the **Prank** code sparingly.

III.G.5.b. **Prank** should not be used for incidental questions such as "Are you a woman?" within the larger context of the reference transaction. Patrons sometimes have (in their minds) legitimate questions about who is serving their information needs. (See sections VI.F. and VI.G.)

III.G.5.c. Some Agents are sometimes unfamiliar or uncomfortable with Patrons' higher degrees of online informality. Keep this in mind when serving Patrons and do not automatically jump to the conclusion that all conversations which include certain elements like these are necessarily "Pranks."

III.G.5.d. Patrons may enter the service with what may appear on first glance to be an inappropriate or "prank" question. Agents should do their best to ascertain the legitimate information needs of patrons through reference interview techniques. Questions that may appear inappropriate on first glance can often lead to successful interactions.

III.G.6. As outlined in the **Section 27** of the *SparkRef Virtual Reference Software Training & Reference Manual* (available at <http://provider.knowitnow.org/node/5>), Agents should *always* assign a Resolution Code to a conversation when ending it.

III.G.7. Those Agents seeing a blank, grey box in place of Resolution Codes are referred to **Section 27.3.3.** of the KnowItNow24x7 software manual.

III.H. Ending a Shift

III.H.1. Agents must be sure to Logout of Fastpath at the end of their shift so they will no longer receive Patrons.

III.H.2. Agents may stay logged into SparkRef to allow for IMing other KIN24x7 agents and for receiving IMs and Broadcast messages from other agents as well as KIN24x7 staff. (See section II.D.1.)

III.I. Best Practices

III.I.1. KIN24x7 Librarians should strive to provide quality reference service as outlined in the *RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers*.

III.I.2. The entire document is available on the American Library Association website at <http://www.ala.org/ala/mgrps/divs/rusa/archive/protools/referenceguide/guidelinesbehavioral.cfm>.

III.I.3. The entire document is also reproduced here in **Appendix II**.

III.I.4. Although not all sections are relevant to virtual reference (e.g., In-Person sections), the document outlines best practices in reference service of which Agents should be aware.

Section IV. Service Guidelines: Email (Asynchronous) KIN24x7 Virtual Reference Service

IV. Email procedures are outlined in the *KnowItNow24x7 Email Answering Manual* available online at: http://provider.knowitnow.org/KINdocs/Email_Answering_Manual.pdf

IV.A. All Agents will access answers@knowitnow.org via **email.clevnet.org** or by clicking **KIN email** (in left column) at <http://provider.knowitnow.org>.

IV.A.1. The same password will be provided to each Agent monitoring the account.

IV.A.1. Refer to **Appendix I** for examples of emails and Replies.

IV.B. No Agents will change any preferences, settings, or folders within the email account.

IV.B.1. This includes ALL preferences and settings (including color, signatures, etc.)

IV.B.2. The KIN24x7 Coordinator and Web Services Coordinator will be the ONLY people authorized to change any settings or preferences in the account.

IV.B.3. KIN24x7 email Agents will be notified of any changes.

IV.B.4. The KIN24x7 Coordinator will routinely sort messages into folders.

IV.C. All Agents will respond to emails within 48 hours *maximum* of receipt of message in Inbox.

IV.C.1. Optimum response time is within 24 hours of receipt.

IV.C.2. All emails received during an agent's shift should be answered by that agent.

IV.C.2.a. Emails received less than one hour before end of shift may be carried over to next agent.

IV.C.3. The Inbox will refresh itself every five minutes, so if the Inbox is left open, new messages will arrive automatically.

IV.C.4. Agents monitoring email during a scheduled shift should do their best to answer all emails that arrive during their shift. "Cherry picking" specific emails is not recommended.

IV.D. All Agents will represent KnowItNow24x7, not their library, when using the Answers account.

IV.D.1. The current recommendation is to keep replies anonymous or use first names.

IV.D.1.a. KIN24x7 Agents may sign their responses with their first name if they wish but are not required to.

IV.E. All Agents will contact the KIN24x7 Coordinator with ANY question on how to respond to an email.

IV.E.1. KIN24x7 Coordinator may be contacted by email: **support@knowitnow.org**.

IV.E.2. Suspicious questions (e.g., *Why is the sky blue?*) will receive legitimate answers from authoritative sources if at all possible (e.g., <http://cimss.ssec.wisc.edu/wxwise/bluesky.html>).

IV.E.2.a. If the Patron needs follow-up, he or she can send a separate email -or- be encouraged to log back into **<http://www.knowitnow.org>**.

IV.E.3. If the KIN24x7 email Librarian suspects a Prank, Agents may make an informed professional decision on how to proceed.

IV.E.3.a. These may also be brought to the attention of the Coordinator, who will make the final call on how to respond.

IV.E.4. It is not necessary to respond to *obviously* fraudulent email addresses, e.g.: klsdjfskldjeklrwe.org, xxxxxxxxxxx.com, etc. Leave these messages tagged but UNflagged (See **IV.C.4.** above)

IV.E.4.a. Check the domain if questionable.

IV.E.4.b. People may use unfamiliar email servers so these may not be readily recognized by the Agent.

IV.E.4.b.i. *Don't* assume fraudulence simply if domain is not recognized.

IV.E.5. Obviously abusive or obscene message do not have to be responded to, but should be brought to the attention of the KIN24x7 Coordinator.

IV.E.5. Do NOT "flag" these messages in Inbox. (See **IV.C.4.** above)

IV.E.6. Patrons asking for a "good book" (with no qualifiers or other information) should be supplied with online readers advisory (RA) sites and basic instructions for their use.

IV.E.6. **<http://provider.knowitnow.org/node/292>** is one page on **KIN24x7 Provider Site** that provides RA sites, as well as the **Readers Advisor Pathfinder** at:

<http://provider.knowitnow.org/pathfinder/readers-advisory-pathfinder>

IV.F. All Agents will have his or her work monitored for quality control

IV.F.1. All sent messages will be automatically copied to the Sent folder.

IV.F.2. Messages in this folder will be regularly reviewed by the KIN24x7 Coordinator.

IV.F.3. Kudos for work well done will be shared with KIN24x7 Agents and QuACK.

IV.F.4. Suggestions on improvement will also be shared with KIN24x7 Agents.

IV.G. A collection of pre-scripted messages is available to KIN24x7 email Librarians at <http://provider.knowitnow.org/node/302> or by clicking the **Documentation** link at the top of the **KIN24x7 Provider Site** home page.

Section V. Reference Resources Available to KIN24x7 Agents

V.A. Ohio Statewide Database Sources

V.A.1. Ohio Web Library

V.A.1.a. When sending statewide resources, Agents should always use OPLIN's <http://kin.oplin.org> as the starting URL.

V.A.1.a.i. When recommending databases for the Patrons' use outside of KIN24x7 sessions, Agents can recommend the **Ohio Web Library** portal at <http://www.ohioweblibrary.org> which is made available through LSTA funds from the State Library of Ohio. Libraries Connect Ohio (LCO), a partnership of Ohio's libraries and library organizations, is the umbrella organization connected with the Ohio Web Library.

V.A.1.a.ii. Remember that Ohio Web Library is more than just OPLIN. When referring to the web site it is recommended to use *Ohio Web Library* not OPLIN.

V.A.2. **INFOhio**, primarily aimed at grades K through 12, is available at <http://www.infohio.org> .

V.A.2.a. INFOhio can be used by Agents when serving these grade levels.

V.A.2.b. Agents can find username and password information for INFOhio by logging into KIN24x7's Provider Page at <http://provider.knowitnow.org> and choosing **Database Access Information**.

V.A.3. OhioLINK databases can be used when serving OhioLINK college or university students. The Agent will see the student's metadata in the User Info tab of the SparkRef Chat window.

V.A.3.a. Agents can find username and password information for OhioLINK by logging into KIN24x7's Provider Page at <http://provider.knowitnow.org> and choosing **Database Access Information**.

V.B. Proprietary databases within the Patron's library (in keeping with library's guidelines)

V.B.1. Agents can direct Patrons to resources accessible to the Patron through their own local library. This will allow Patrons to access authoritative information outside of the KIN24x7 session.

V.C. Free authoritative material available on the Internet

V.C.1. Agents should evaluate web sites for authority and objectivity before sharing with Patron.

V.C.2. When information is available only on a website that is questionable to the Agent, he or she should inform the Patron of this.

V.C.3. Agents should be familiar with criteria for web site evaluation.

V.C.3.a. <http://school.discoveryeducation.com/schrockguide/eval.html>

V.C.3.b. <http://kathyschrock.net/abceval/>

V.C.3.c. Many other sites for evaluation criteria are available online as well.

V.C.4. Cite Sources: When a web site is not directly pushed to a Patron, Agents should always provide a citation for the resource where the information was found. At the very least, the URL of the site should be shared with the Patron.

V.D. Print resources as needed.

V.D.1. These may be scanned and sent to the Patron as a File Transfer or as a Follow-up (see **III.C.**)

V.E. Oregon Resources

V.E.1. Detailed instructions for accessing Oregon databases is available by logging into the KIN24x7 Provider Site and accessing the Database Access Information selection in the left frame.

V.E.2. Oregon does have some statewide databases listed at the KIN24x7 Provider site under **Database Access Information**. Librarians are also encouraged to steer Oregon patrons to their local library's resources as well.

Section VI. Miscellaneous Guidelines

VI.A. Accepting Live Sessions

VI.A.1. Agents are expected to work with up to four Patrons at one time on the live service (see **III.B.1.**).

VI.A.2. Agents should only accept a *maximum* of four simultaneous webchats using the SparkRef software.

VI.A.3. Picking up more than one Patron at a time during an Agent's KIN24x7 shift is both desirable (from a customer service perspective) and often necessary (from a traffic volume perspective).

VI.A.3.a. The Agent is encouraged to "pick up" another Patron and let him or her know that the Agent is currently working with someone else and will be with the Patron as quickly as possible. This is perfectly acceptable.

VI.A.3.b. Agents should keep all Patrons updated on their status. If a Patron asks if the Agent is still there, the Agent should send a quick message stating his or her status (e.g., "I'm still looking...", "Thanks for holding. I'll be right with you...", etc.).

VI.B. Chatting

VI.B.1. In order to communicate most effectively in the chat environment, Agents should break long sentences up into shorter segments and should avoid sending lengthy messages.

VI.B.2. Agents must avoid long pauses between messages sent to Patrons.

VI.B.2.a. Agents should strive to send a message to the Patron *at least* once every minute.

VI.B.2.b. Something as short as "still looking..." is acceptable to keep Patrons informed of status.

VI.B.3. As a *general* rule, Agents should use conventional grammar, spelling, and punctuation.

VI.B.4. Agents who choose to use chat lingo (btw, lol, etc.) and/or emoticons (i.e., ☺, ;-), etc.) should only do so if the Patron initiates this informal style of communicating. Agents should be VERY aware of the meaning of the emoticons sent.

VI.B.5. Personal canned messages can be used for a variety of purposes; however, one of the more useful can be to respond quickly to a large number of similar questions. In the example image above, the agent has added Personal Canned messages for topics like "science fair question," "how far to moon," and "biology resources." The actual message for each of these can include a small amount of text and web links. After a science fair season or school topic has run its course, these kinds of canned messages can then be deleted and new messages added to client. For more information, see *SparkRef Virtual Reference Software Training & Reference Manual, Section 19.3.1*.

VI.C. Dealing with Difficult Patrons.

VI.C.1. Because of the anonymous environment of virtual reference and the nature of public service, Agents may encounter difficult Patrons.

VI.C.2. Until a Patron becomes abusive or overly offensive, he or she must be given the benefit of the doubt.

VI.C.3. Patrons who log on with no particular question or who just wish to "chat" with the Librarian should be encouraged to ask a specific question.

VI.C.3.a. If he or she does not have one, the Librarian may suggest *politely* that the Patron log back on when he or she does have a question to ask, before disconnecting.

VI.C.4. Patrons who are **overly rude, obscene**, ask an **offensive question**, who use **vulgar or threatening language** should be sent the scripted message: Inappropriate/Foul Language (#1) "Your behavior is inappropriate. Please work with me so I can provide the best service possible to you."

VI.C.4.1. At the next instance of such behavior, they should be sent the scripted message: Inappropriate/Foul Language (#2) "When you have a question I can help answer, I will be glad to help you. Goodbye." and the call should be closed.

VI.C.5. Librarians with concerns about specific incidents should contact support@knowitnow.org.

VI.C.6. These kinds of calls may be given a Resolution Code of "Prank." (See **III.G.5.**)

VI.D. Working with Distressed Patrons

VI.D.1. KnowItNow24x7 is not intended for providing service to Patrons who need assistance beyond the scope of reference service. Some examples that fall outside this scope include Patrons who are in danger, ill, depressed, or suicidal.

VI.D.2. The Agent's role in such circumstances is to *politely* and *diplomatically* provide a referral to an agency that may provide the assistance the Patron may need.

VI.D.3. Patrons who state that they are ill or in danger should be *politely* and *diplomatically* instructed to call 911 or their local police department. Do not make a bad situation worse by being perfunctory or dismissive.

VI.D.3.a. Agents are able to use the Patron's zip code information to provide him or her a direct phone number for local emergency services (police, ambulance, etc.) if this is necessary.

VI.D.4. Patrons who state that they are depressed or suicidal should be *politely* and *diplomatically* directed to 1-800-273-8255, **National Suicide Prevention Lifeline** (a 24-hour, toll-free suicide prevention service available to anyone in suicidal crisis). Their web address is **<http://www.suicidepreventionlifeline.org>**.

VI.D.4.a. Agents should **NOT** be flippant, dismissive, or disrespectful of Patrons in these situations. While the veracity of the Patron's claim cannot be verified online, these situations should be taken extremely seriously.

VI.D.5. Patrons who have other problems may be referred to the United Way First Call for Help service in their area. The national search is available at **<http://www.211.org/>**.

VI.E. Personal Opinions

VI.E.1. Librarians should not give their personal opinions or make comments about the subject of the Patron's question (except as outlined in **VI.E.3.** below).

VI.E.2. Offering opinions on medical or legal questions is *never* appropriate. Agents should refer to the American Library Association's ***Guidelines for Medical, Legal, and Business Responses***.

VI.E.2.a The entire document is available on the American Library Association website at <http://www.lita.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesmedical.cfm>.

VI.E.2.b The entire document is also reproduced here in **Appendix III**.

VI.E.3. The only time that the offering of a subjective opinion on a subject is acceptable is when recommending reading or other entertainment suggestions to a Patron. If the Patron asks if the Librarian liked a certain book (movie, audiobook, CD, etc.), the Librarian may offer their viewpoint as long as this is **CLEARLY** stated that this is his or her perspective on the directly relevant material.

VI.E.3.a. Follow-up these kinds of statements with suggestions from sources (online or print) that will provide Patrons with reading suggestions or with the opportunity to allow Patron to search for their own preferences.

VI.E.3.b. Librarians should **NEVER** make statements such as "Sci-fi is boring" or use pejorative terms like using "bodice-ripper" to refer to romance novels.

VI.F. Patron Privacy

VI.F.1. Avoid asking Patrons for any more information than is necessary to complete the transaction.

VI.F.2. When Agents do need to ask for personal information (a Patron's grade in school or whether they have a library card), an explanation as to why the information is necessary should be given.

VI.F.3. Agents should not ask for library card numbers and passwords. Patrons should type in their own library card numbers and passwords. (see **VI.J.3.e.**)

VI.F.4. Agents should NEVER ask for a Patron's address or other information that would be inappropriate for the Patron to give in any other online setting (chat, forums, etc.).

VI.G. Librarian Privacy

VI.G.1. Librarians are under no obligation to answer personal questions from Patrons, such as their real name, gender, location, or schedule.

VI.G.1.a. The use of pseudonyms is acceptable in cases like this.

VI.G.2. Librarians should also not share this information about other Librarians.

VI.G.3. While Librarians are under no obligation to answer personal questions, a Patron's asking for this information should not be seen as an invasion of privacy or "prank". The informal nature of chat makes this a not-unexpected question for the Patron to ask.

VI.G.3.a. If the Librarian should be asked these kinds of questions and is not comfortable answering them, he or she should simply be polite and steer the conversation back to the reference question at-hand.

VI.H. Sexual questions

VI.H.1. Questions about sexual education, sexual health, or human anatomy should be initially treated as legitimate reference questions.

VI.H.2. If the Patron's questions or comments become inappropriate during the transaction, the Librarian should treat the call as a difficult Patron, described in **VI.C.** above.

VI.H.3. Pornography

VI.H.3.a. KnowItNow24x7 Agents will not intentionally provide pornography to Patrons of any age.

VI.H.3.b. If asked to search for online pornography sites or content, Agents should inform the Patron that questions seeking online pornography are beyond the scope of the service.

VI.H.3.c. The nature of online searching being what it is, Agents should *never* simply send search results screens from search engines such as Google, Yahoo, etc., *especially* image search results. This can be an unintended conduit for providing unwanted content to Patrons.

VI.I. Questions about the KnowItNow24x7 service

VI.I.1. Patrons may ask questions about the KnowItNow24x7 service itself. Librarians may answer their questions or direct them to the "About..." information on the Patron sign-in pages.

VI.I.1.a. <http://www.knowitnow.org/about.php>

VI.I.1.b. <http://academic.knowitnow.org/about.php>

VI.I.2. Questions about the service's policies or management or very specific questions about procedures, funding, or staffing should be referred to the KnowItNow24x7 Coordinator at support@knowitnow.org.

VI.J. Questions about local library policies and accounts

VI.J.1. Being that KnowItNow24x7 is a statewide service, it is normal for Agents to serve Patrons of distant locations.

VI.J.1.a. The partnership with Oregon's L-net now provides situations where Agents will be serving Patrons in another state as well.

VI.J.2. Agents are not expected to "masquerade" as a staff member of the Patron's local library.

VI.J.2.a. It is acceptable for an Agent to state where they are working from.

VI.J.2.b. This, however, does not provide the opportunity to decline helping a Patron who is not located in the Agent's immediate region.

VI.J.3. Agents are expected to assist distant Patron's to the best of their ability with, for example:

VI.J.3.a. looking up books in other libraries' catalogs

VI.J.3.b. looking up fine rates and policies

VI.J.3.c. looking up hours

VI.J.3.d. looking up locations, addresses, and directions

VI.J.3.e. helping patron put reserves on items online by sending the appropriate library's page

VI.J.3.e.i. Don't ask for the Patron's library card number

VI.J.3.e.ii. Push the appropriate page, instruct the Patron as to what to do, and let him or her type in the number.

VI.J.4. There are instances when a Patron **MUST** contact his or her local library.

VI.J.4.a. Examples:

VI.J.4.a.i. individual fines on items checked out

VI.J.4.a.ii. on-shelf availability of a certain item

VI.J.4.b. In these cases, the Agent should provide direct, complete email and phone contact information where both are available for the local library/institution.

VII. Technical Support

VII.A. If KIN24x7 agents have problems related to the service, they should notify KIN24x7 staff as soon as possible after the problem occurs or is discovered.

VII.B. If problems are unreported, they cannot be addressed.

VII.C. However, problems are not all equal and the following guidelines are provided to allow agents to know when and how to contact KIN24x7 staff.

VII.D. It is *VERY IMPORTANT* to leave a message and a call back phone number if KIN24x7 staff is not immediately available when called.

VII.D.1. If a problem is determined to be system-wide, Agents may not get an individual call-back. KIN24x7 staff will inform all Agents through IM broadcast or email of an existing problem and its solution.

VII.E. Issues have been divided into two categories: *Urgent* (VII.E.1.) and *Noteworthy* (VII.E.2.)

VII.E.1. Urgent (*requiring immediate attention by phone*)

VII.E.1.a. **Urgent Problems = Phone Call to KIN24x7 Technical Support**

VII.E.1.b. Definition: Urgent problems prevent the agent from providing KIN24x7 service. These require immediate attention.

VII.E.1.c. Examples of urgent problems include (but are not limited to):

VII.E.1.c.i. You are unable to login to server.

VII.E.1.c.ii. Fastpath tab is not showing on SparkRef client

VII.E.1.c.iii. SparkRef client crashing repeatedly (see **VII.E.1.e.v.** below)

VII.E.1.d. Complete contact information for KIN24x7 staff is available by logging into <http://provider.knowitnow.org> and choosing **Contact Us**.

VII.E.1.d.i. If Web Services Coordinator cannot be reached after one hour of attempts, contact KIN24x7 Statewide Coordinator.

VII.E.1.e. **Troubleshooting: Before calling, Agents should try these troubleshooting tips:**

VII.E.1.e.i. Always try exiting SparkRef and logging back in. Be sure you are exiting entirely and not simply clicking the X in the upper right of the control panel. Sometimes it will be necessary to close SparkRef using the Task Manager on your computer. Does this alleviate or change the problem?

VII.E.1.e.ii. Rebooting the entire computer is sometimes necessary. If re-logging into SparkRef does not resolve the issue at hand, try this. Does this alleviate or change the problem?

VII.E.1.e.iii. Can you go to other web sites on your computer?

-If NO:

- Most likely it is a local network problem unrelated to KIN24x7.

- Wait for a reasonable amount of time. Try again.

- If the problem is still present, contact local tech support or Internet Service Provider.

- If YES:

- The problem may be related to the software: call for KIN24x7 support.

VII.E.1.e.iv. If logging in is the problem:

- Are the correct username and password and server being used?

- If it is a shared account, has another staff member changed the password?
- The server for the live service is chat.knowitnow.org. Is this the one being used?

VII.E.1.e.v. If SparkRef client is crashing repeatedly:

- Is your Internet connection crashing repeatedly as well?
- Are other applications affected on your computer?

If YES:

- The problem is most likely localized. Check with local IT support.

If NO:

- Contact KIN24x7 technical support.

VII.E.2. Noteworthy (requiring attention by email)

VII.E.2.a. **Noteworthy Problems = Email to support@knowitnow.org**

VII.E.2.b. Definition: Noteworthy problems allow agents to continue to provide KIN24x7 service, although possibly in a limited capacity.

VII.E.2.b.i. Agents experiencing these problems are able to interact with Patrons and to finish out their shifts. These require attention but not necessarily immediately.

VII.E.2.c. Examples of Noteworthy Problems include (but are not limited to):

VII.E.2.c.i. You are unable to transfer

- Temporary work-around: Answer questions as best as possible

VII.E.2.c.ii. You are unable to hear sounds announcing incoming messages.

- Temporary work-around: Monitor computer closely
- See **VII.E.2.e.ii.** below for possible solutions

VII.E.2.c.iii. You are not sure how something is done using the software.

- Temporary work-around: IM another Agent online at the same time
- Temporary work-around: Check documentation at <http://provider.knowitnow.org/node/5> or online Training Materials at <http://provider.knowitnow.org/node/286>.
- Agents are also encouraged to email the KIN24x7 Coordinator with these types of questions and to request additional training, if necessary.

VII.E.2.c.iv. SparkRef software crashes repeatedly

- This is a major problem but cannot be diagnosed easily. Call KIN24x7 technical support at earliest convenience (if happening during evening).

VII.E.2.d. Contact email to be used is **support@knowitnow.org**

VII.E.2.d.i. The email should include:

- Specific detailed information about the problem
- When the problem occurred
- Has the problem happened before? Is it recurring?
- If related to a browser, which browser? Internet Explorer, Firefox, etc.
- Are you using a PC, Mac, Linux, etc.?
- Phone number (KIN24x7 staff may wish to discuss problem in more depth)

VII.E.2.e. **Troubleshooting: Before calling, agents should try these troubleshooting tips:**

VII.E.2.e.i. The troubleshooting tips outlined under VII.E.1.e. should also be tried here

VII.E.2.e.ii. If the problem is related to audio:

- Are speakers connected to PC and turned on and up?
- Is sound muted on computer's control panel?
- Has someone recently tried to change the sounds in SparkRef?

Section VIII. Problems Relating to Scheduling, Training, Policies, Procedures, Etc.

VIII.A. If agents have procedural, policy, or scheduling questions, they are encouraged to contact the statewide KIN24x7 Coordinator.

VIII.B. Please feel free to contact KIN24x7 staff during regular hours if more detailed explanations are needed for any feature of the software.

VIII.B.1. If Agents would like additional training, this can be arranged by contacting the KIN24x7 Coordinator.

VIII.C. There are also the online training tools available at <http://provider.knowitnow.org/node/286> .

Appendix I

Answers@KnowItNow.org Email Progression: Original to Response, With and Without Metadata

Note: Patron names have been overwritten using XXXX in these examples. There is no need to do this when replying to the Patron as an answers@knowitnow.org Agent.

I. Original Message (without metadata)-----

Subject: leave a message form

From: XXXX

Email Address: XXXX

Message:How do you say Movies in spanish?

II. Display after clicking Reply-----

This email is in response to your recent question to KnowItNow24x7, Ohio's statewide online reference service.

[text of response]

I hope this information helps answer your question. Thank you for using KnowItNow24x7.

----- Original Message -----

From: XXXX

To: answers@knowitnow.org

Sent: Friday, October 24, 2008 3:26:25 PM (GMT-0500) America/New_York

Subject: leave a message form

From: XXXX

Email Address: XXXX

Message:How do you say Movies in spanish?

III. After editing and adding answer-----

Subject: KnowItNow24x7 Question about "movies" in Spanish

Hello, XXXX:

This email is in response to your recent question to KnowItNow24x7, Ohio's statewide online reference service.

According to the "The Concise Oxford Spanish Dictionary" there are several words that can be translated as movies:

movie: la película (f) > movies: películas

movie: el film or filme (m) > movies: filmes

But to say something like I'm going "to the movies," one uses "el cine."

The "The Concise Oxford Spanish Dictionary" is online at <http://www.oplin.org/databases/> .

I hope this information helps answer your question. Thank you for using KnowItNow24x7.

----- Original Message -----

From: XXXX

Email Address: XXXX @neo.rr.com

Message:How do you say Movies in spanish?

IV. Original message (with metadata) after clicking Reply -----

This email is in response to your recent question to KnowItNow24x7, Ohio's statewide online reference service.

[text of response]

I hope this information helps answer your question. Thank you for using KnowItNow24x7.

----- Original Message -----

From: XXXX

To: answers@knowitnow.org

Sent: Monday, October 27, 2008 4:00:14 PM (GMT-0500) America/New_York

Subject: leave a message form

From: XXXX

Email Address: XXXX @yahoo.com

Message:what is the mode

Associated Data

Service = HomeworkNow

location map = <http://maps.google.com/maps?f=q&hl=en&geocode=&q=44138>

zipcode = 44138

workgroup = reference@workgroup.chat.knowitnow.org

url = <http://www.cpl.org>

userID = j0MFqq55Ql

username = XXXX

email = Not Specified

queuePicker = ScienceHWN

library = Cleveland Public Library

question = what is the range

V. Example of an original message (with metadata) after editing -----

Hello, XXXX:

This email is in response to your recent question to KnowItNow24x7, Ohio's statewide online reference service.

I did not see specific numbers associated with your question, so let me give you some definitions of "mode" and "range." This web site gives a nice description as well as examples of mode, range, median, and mean:

http://mathforum.org/library/drmath/sets/select/dm_mean_median.html

This page specifically gives detailed definitions of those terms (and how to find them):
<http://mathforum.org/library/drmath/view/58326.html>

Here is the answer from that page:

Consider the set of numbers 80, 90, 90, 100, 85, 90. They could be math grades, for example.

The MEAN is the arithmetic average, the average you are probably used to finding for a set of numbers - add up the numbers and divide by how many there are: $(80 + 90 + 90 + 100 + 85 + 90) / 6 = 89 \frac{1}{6}$.

The MEDIAN is the number in the middle. In order to find the median, you have to put the values in order from lowest to highest, then find the number that is exactly in the middle:

80 85 90 90 90 100
 ^

since there is an even number of values, the MEDIAN is between these two, or it is 90. Notice that there is exactly the same number of values ABOVE the median as BELOW it!

The MODE is the value that occurs most often. In this case, since there are 3 90's, the mode is 90. A set of data can have more than one mode.

The RANGE is the difference between the lowest and highest values. In this case $100 - 80 = 20$, so the range is 20. The range tells you something about how spread out the data are. Data with large ranges tend to be more spread out.

I hope this information helps answer your question. Thank you for using KnowItNow24x7.

----- Original Message -----

From: XXXX @yahoo.com

To: answers@knowitnow.org

Sent: Monday, October 27, 2008 4:00:14 PM (GMT-0500) America/New_York

Subject: leave a message form

From: XXXX

Email Address: XXXX @yahoo.com

Message: what is the mode

Appendix II

Guidelines for Behavioral Performance of Reference and Information Service Providers

<http://www.ala.org/ala/mgrps/divs/rusa/archive/protocols/referenceguide/guidelinesbehavioral.cfm>

Revised by MOUSS Management of Reference Committee and approved by the RUSA Board of Directors, June 2004. ([Listing of members and authors.](#))

Introduction

The face of Reference Services has changed significantly since the original RUSA Guidelines for Behavioral Performance were first published in 1996¹. Intended to be used in the training, development, and/or evaluation of library professionals and staff, the Guidelines have subsequently been favorably evaluated by the profession, and currently enjoy widespread acceptance as standards for the measurement of effective reference transactions.²

The original Guidelines dealt primarily with face-to-face interactions between Reference staff and library users. Even at the time, however, the world of Reference was moving beyond the traditional Reference Desk. Email and online chat services have since become popular with both Patrons and library staff, and are expanding in all types of libraries, from public to academic to school libraries and beyond. Although some of the statements in the original Guidelines can be applied to remote forms of reference, the lack of traditional visual and non-verbal cues produces a different type of library-Patron interaction.

One constant that the shift away from in-person encounters has not lessened is the need for good communication skills. The Virtual Reference Desk recognized this and incorporated an “Interactive” component into their “Facets of Quality for Digital Reference Services,” stating that “[d]igital reference services should provide opportunities for an effective reference interview, so that users can communicate necessary information to experts and to clarify vague user questions.”³

In all forms of reference services, the success of the transaction is measured not only by the information conveyed, but also by the positive or negative impact of the Patron/staff interaction. The positive or negative behavior of the reference staff member (as observed by the Patron) becomes a significant factor in perceived success or failure. This connection has been born out in the work of researchers like Gers and Seward (1985), who found that “behaviors have a strong influence on performance”⁴, and Whitlatch (1990), who stated “Librarian courtesy, interest, and helpfulness are crucial in providing successful reference service. Libraries must select and retain staff who have these service orientations toward users.”⁵ Matthew Saxton (2002) put the Guidelines to a statistical test, and found that they did indeed correlate highly to a successful reference transaction.⁶

The original RUSA Ad Hoc Committee that designed the Guidelines recognized the need for future adaptation to deal with issues related to remote users, and in late 2001 the RUSA Standards and Guidelines Committee requested that the RSS Management of Reference Committee undertake this revision. The revised Guidelines reflect the understanding that while in-person and remote reference interviews share some points in common, each also has its own peculiar characteristics that need to be addressed separately in the formation of standard guidelines.

With this in mind, the original format has been rearranged to reflect the changes in our profession. The five main areas (Approachability, Interest, Listening/Inquiring, Searching, and Follow Up) remain the same, but three distinct categories have been added (where appropriate) under each. They are:

General--Guidelines that can be applied in any type of reference interaction, including both in person and remote transactions.

In Person--Additional guidelines that are specific to face-to-face encounters, and make the most sense in this context.

Remote--Additional guidelines that are specific to reference encounters by telephone, email, chat, etc., where traditional visual and non-verbal cues do not exist.

Some of the original Guidelines have also been rewritten to make the service ideal they convey apply more generally. The goal of this document's revision has been to create a conceptual framework and service ethic with which reference professionals can consider all Patron reference interactions, and help establish a service standard for their institution.

Note: The term *Librarian* in this document applies to all who provide reference and informational services directly to library users.

1.0 Approachability

In order to have a successful reference transaction, Patrons must be able to identify that a reference Librarian is available to provide assistance and also must feel comfortable in going to that person for help. In remote environments, this also means placing contact information for chat, email, telephone, and other services in prominent locations, to make them obvious and welcoming to Patrons. Approachability behaviors, such as the initial verbal and non-verbal responses of the Librarian, will set the tone for the entire communication process, and will influence the depth and level of interaction between the staff and the Patrons. At this stage in the process, the behaviors exhibited by the staff member should serve to welcome the Patrons and to place them at ease. The Librarian's role in the communications process is to make the Patrons feel comfortable in a situation that may be perceived as intimidating, risky, confusing, and overwhelming.

To be approachable, the Librarian:

General

1.1 Establishes a "reference presence" wherever Patrons look for it. This includes having Reference Services in a highly visible location and using proper signage (both in the library and on the library's Web site) to indicate the location, hours, and availability of in-person and remote help or assistance.

1.2 Is poised and ready to engage approaching Patrons. The Librarian is aware of the need to stop all other activities when Patrons approach and focus attention on the Patrons' needs.

1.3 Acknowledges others waiting for service.

1.3.1 Employs a system of question triage to identify what types of questions the Patrons have when more than two Patrons are waiting. Frequently asked questions, brief informational questions, directional questions, and referrals can be answered quickly, allowing more time to devote to in-depth reference questions.

In Person

- 1.4 Establishes initial eye contact with Patrons, and acknowledges the presence of Patrons through smiling and attentive and welcoming body language.
- 1.5 Acknowledges Patrons through the use of a friendly greeting to initiate conversation, and by standing up, moving forward, or moving closer to them.
- 1.6 Remains visible to Patrons as much as possible.
- 1.7 Roves through the reference area offering assistance whenever possible. Librarians should make themselves available to Patrons by offering assistance at their point-of-need rather than waiting for Patrons to come to the reference desk. To rove successfully, the Librarian should:
 - 1.7.1 Be mobile. Get the Patrons started on the initial steps of their search, then move on to other Patrons.
 - 1.7.2 Address the Patrons before addressing their computer screen. Patrons are more likely to confide in Librarians and discuss their needs if they do not perceive the Librarians as "policing" the area.
 - 1.7.3 Approach Patrons and offer assistance with lines such as, "Are you finding what you need?" "Can I help you with anything?" or "How is your search going?"
 - 1.7.4 Check back on the Patron's progress after helping them start a search.
 - 1.7.5 If the reference desk has been left unattended, check back periodically to see if there are Patrons waiting for assistance there.

Remote

- 1.8 Should provide prominent, jargon-free links to all forms of reference services from the *home page* of the library's Web site, and throughout the site wherever research assistance may be sought out. The Web should be used to make reference services easy to find and convenient.

2.0 *Interest*

A successful Librarian must demonstrate a high degree of interest in the reference transaction. While not every query will contain stimulating intellectual challenges, the Librarian should be interested in each Patron's informational need and should be committed to providing the most effective assistance. Librarians who demonstrate a high level of interest in the inquiries of their Patrons will generate a higher level of satisfaction among users. To demonstrate interest, the Librarian:

General

- 2.1 Faces the Patron when speaking and listening.
- 2.2 Focuses attention on the Patrons.

In Person

- 2.3 Faces Patrons when speaking and listening.

- 2.4 Maintains or re-establishes eye contact with Patrons throughout the transaction.
- 2.5 Signals an understanding of Patrons' needs through verbal or non-verbal confirmation, such as nodding of the head or brief comments or questions.

Remote

- 2.6 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.
- 2.7 Acknowledges user email questions in a timely manner.
- 2.8 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.

3.0 Listening/Inquiring.

The reference interview is the heart of the reference transaction and is crucial to the success of the process. The Librarian must be effective in identifying the Patron's information needs and must do so in a manner that keeps Patrons at ease. Strong listening and questioning skills are necessary for a positive interaction. As a good communicator, the Librarian:

General

- 3.1 Communicates in a receptive, cordial, and encouraging manner.
- 3.2 Uses a tone of voice and/or written language appropriate to the nature of the transaction.
- 3.3 Allows the Patrons to state fully their information need in their own words before responding.
- 3.4 Identifies the goals or objectives of the user's research, when appropriate.
- 3.5 Rephrases the question or request and asks for confirmation to ensure that it is understood.
- 3.6 Seeks to clarify confusing terminology and avoids excessive jargon.
- 3.7 Uses open-ended questioning techniques to encourage Patrons to expand on the request or present additional information. Some examples of such questions include:
 - Please tell me more about your topic.
 - What additional information can you give me?
 - How much information do you need?
- 3.8 Uses closed and/or clarifying questions to refine the search query. Some examples of clarifying questions are:
 - What have you already found?
 - What type of information do you need (books, articles, etc.)?
 - Do you need current or historical information?

3.9 Maintains objectivity and does not interject value judgments about subject matter or the nature of the question into the transaction.

Remote

3.10 Uses reference interviews or Web forms to gather as much information as possible without compromising user privacy.

4.0 Searching

The search process is the portion of the transaction in which behavior and accuracy intersect. Without an effective search, not only is the desired information unlikely to be found, but Patrons may become discouraged as well. Yet many of the aspects of searching that lead to accurate results are still dependent on the behavior of the Librarian. As an effective searcher, the Librarian:

General

4.1 Finds out what Patrons have already tried, and encourages Patrons to contribute ideas.

4.2 Constructs a competent and complete search strategy. This involves:

- Selecting search terms that are most related to the information desired.
- Verifying spelling and other possible factual errors in the original query.
- Identifying sources appropriate to the Patron's need that have the highest probability of containing information relevant to the Patron's query.

4.3 Explains the search strategy and sequence to the Patrons, as well as the sources to be used.

4.4 Attempts to conduct the search within the Patrons' allotted time frame.

4.5 Explains how to use sources when appropriate.

4.6 Works with the Patrons to narrow or broaden the topic when too little or too much information is identified.

4.7 Asks the Patrons if additional information is needed after an initial result is found.

4.8 Recognizes when to refer Patrons to a more appropriate guide, database, library, Librarian, or other resource.

4.9 Offers pointers, detailed search paths (including complete URLs), and names of resources used to find the answer, so that Patrons can learn to answer similar questions on their own.

In Person

4.10 Accompanies the Patrons in the search (at least in the initial stages of the search process).

Remote

4.11 Uses appropriate technology (such as Internet, scanning, faxing, etc.) to help guide Patrons through library resources, when possible.

5.0 Follow-up

The reference transaction does not end when the Librarian leaves the Patrons. The Librarian is responsible for determining if the Patrons are satisfied with the results of the search, and is also responsible for referring the Patrons to other sources, even when those sources are not available in the local library. For successful follow-up, the Librarian:

General

5.1 Asks Patrons if their questions have been completely answered.

5.2 Encourages the Patrons to return if they have further questions by making a statement such as “If you don’t find what you are looking for, please come back and we’ll try something else.”

5.3 Roving (see 1.7) is an excellent technique for follow-up.

5.4 Consults other Librarians or experts in the field when additional subject expertise is needed.

5.5 Makes Patrons aware of other appropriate reference services (email, etc.).

5.6 Makes arrangements, when appropriate, with the Patrons to research a question even after the reference transaction has been completed.

5.7 Refers the Patrons to other sources or institutions when the query cannot be answered to the satisfaction of the Patron.

5.8 Facilitates the process of referring Patrons to another library or information agency through activities such as calling ahead, providing direction and instructions, and providing the library and the Patrons with as much information as possible about the amount of information required, and sources already consulted.

5.9 Takes care not to end the reference interview prematurely.⁷

Remote

5.9 Suggests that the Patrons visit or call the library when appropriate.

Endnotes

1. RUSA. “Guidelines for Behavioral Performance of Reference and Information Services Professionals.” *RQ*, 36 (Winter 1996) 200-3. [[Return to text](#)]

2. For example, see: Gatten, Jeffrey N., and Carolyn J. Radcliff. "Assessing Reference Behaviors with Unobtrusive Testing." In *Library Evaluation: A Casebook and Can-Do Guide*, ed. Wallace, Danny P. and Connie Van Fleet. (Englewood, Colorado: Libraries Unlimited, Inc., 2001), 105-115. [[Return to text](#)]

3. Virtual Reference Desk. "Facets of Quality for Digital Reference Services, Version 5." June 2003. Available: <http://www.vrd.org/facets-06-03.shtml> [[Return to text](#)]
4. Gers, Ralph and Lillie J. Seward. "Improving Reference Performance: Results of a Statewide Study." *Library Journal*, November 1, 1985. 32-35. [[Return to text](#)]
5. Whitlatch, Jo Bell. "Reference Service Effectiveness." *RQ*, Winter 1990. 205-220. [[Return to text](#)]
6. Saxton, Matthew L. Evaluation of Reference Service in Public Libraries Using a Hierarchical Linear Model: Applying Multiple Regression Analysis to a Multi-Level Research. Ph.D. Dissertation, UCLA, 2000. [[Return to text](#)]
7. Ross, Catherine Sheldrick and Patricia Dewdney. "Negative Closure: Strategies and Counter-Strategies in the Reference Transaction." *Reference & User Services Quarterly*, 38(2) 1998. 151-63. [[Return to text](#)]

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Appendix III

Guidelines for Medical, Legal, and Business Responses

<http://www.lita.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinesmedical.cfm>

Originally prepared by the Standards and Guidelines Committee, Reference and Adult Services Division, American Library Association in 1992. Revised and updated by the Business Reference and Services Section, Reference and User Services Association, in 2000 and 2001. Approved by the RUSA Board of Directors, June 2001.

Introduction

This is the second revision of the guidelines developed by members of the American Library Association designed to assist information services staff in meeting user needs and in responding to users requesting medical, legal or business information. In this edition, revisions are focused on three issues: (1) new terminology, specifically the replacement of the term 'reference' with the term 'information services,' 'Patron' with 'user' and 'Librarian' with 'information services staff;' (2) recognition and incorporation of the impacts that rapidly changing technologies have on the delivery of specialized information services and source formats; and (3) change in focus of the original intention of the guideline from one of addressing the needs of non-specialists at general reference desks to one which addresses the needs of both specialists and non-specialists.

Serving as an enhancement to the information included in "Guidelines for Information Services" (2000), the following issues and perspectives specific to medical, legal, and business information service responses are addressed:

1. Role of Information Services Staff
2. Sources
3. Information Service Responses for Off-Site Users
4. Ethics

1.0 Role of Information Services Staff

1.0.1 A library's information services staff must have the knowledge and preparation appropriate to meet the routine legal, medical, or business information needs of their clientele.

1.0.2 Staff members need to keep current in subject areas and refer questions beyond their level of competency.

1.0.3 Libraries should develop written disclaimers stating a policy on providing specialized information service denoting variations in types and levels of service. The level of assistance and interpretation provided to users should reflect differing degrees of subject expertise between specialists and non-specialists.

1.0.4 When asked legal, medical, or business questions, information services staff should make clear their roles as stated in their library's specialized information services policies.

1.0.5 Information services staff members are responsible for providing complete and accurate responses to users' questions when possible and for guiding library users to the most appropriate resources for their information needs.

1.0.6 Staff should provide instruction in the use of the sources, enabling users to pursue information independently and effectively, if so desired.

1.0.7 If a user has trouble understanding a source, an alternative source should be sought for further explanation or for comparison. If no appropriate sources can be located, a referral should be made.

1.0.8 The information service transaction should satisfy the user's need for information, by providing either accurate sources in hand or clear and concise referrals to obtainable sources and/or services located elsewhere.

1.1 Advice

1.1.1 Libraries may advise users regarding the relative merits of sources, regardless of their medium, and make recommendations regarding library materials when appropriate.

1.1.2 Materials recommended should be the most comprehensive and the most current available.

1.2 Confidentiality

1.2.1 Confidentiality of user requests, both in-person and off-site, must be respected at all times.

1.2.2 Questions should not be discussed outside of the library except when seeking assistance with an information query and names should never be mentioned without the user's permission.

1.3 Tact

1.3.1 Information services staff should use discretion during the reference interview. While it is important to conduct a thorough interview, this should be done in such a way as to minimize discomfort to the user.

1.3.2 Staff should try to identify the issue in question without intruding on the user's privacy.

1.3.3 Information services staff should be impartial and nonjudgmental in handling users' queries.

2.0 Sources

2.0.1 Each library should evaluate and acquire appropriate sources in medical, legal, and business subject areas that are current, accurate, and accessible to meet the needs of the community served.

2.0.2 Users have a right to access information available in library collections within the parameters of copyright and licensing agreements. Information should not be withheld from a user unless the use of a resource in providing that information violates a licensing agreement.

2.0.3 Information services staff should direct the user to possible sources where the information the user requires would be provided. These sources may include in-house print and non-print collections as well as access to external resources.

2.0.4 Aids that assist users in identifying, using, and evaluating relevant sources should be made available.

2.1 Currency of Sources

2.1.1 Libraries should provide the most current information possible, consistent with the needs of the library's primary clientele and within the limitations of the library's materials budget and collection development policy.

2.1.2 User guides should be periodically evaluated to remove references to dated materials.

2.1.3 Information services collections should be weeded to withdraw or transfer dated materials to the general collections.

2.1.4 Currency of publication dates should be made clear to the user in the case of information and information resources of a time-sensitive nature.

2.1.5 Since information in medical, legal, and business areas changes rapidly, the user should be advised that there might be more current information available elsewhere on the topic.

2.2 Accuracy of Sources

2.2.1 Information service collections may provide more than one source that answers a user's request for medical, legal, or business information. Whenever possible, information services staff members should assist users in assessing the accuracy of information by providing alternate sources for comparison or explanation.

2.2.2 In cases where advertisements or solicitations may be misinterpreted as information content, staff should assist users in making the differentiation whenever possible.

2.3 Referrals to Other Sources

2.3.1 Information services staff should make every effort to answer users' questions in accordance with local information services and collection development policies.

2.3.2 If the question cannot be answered using available sources and personnel, they should be prepared to refer questions to individuals as well as to published sources in a variety of formats.

2.3.3 Referrals should be made to other sources only if the agency, service, or individual, will extend its services to that user.

2.3.4 Awareness of community, state, and private services outside of the library is important and referrals to services should follow any protocols in effect.

2.3.5 Staff may not make recommendations to specific lawyers, legal firms, doctors, other medical care providers or business professionals but may provide access to other information that may help the user identify and locate those resources.

3.0 Information Service Responses for Off-site Users

Off-site users include both affiliated and non-affiliated users requesting assistance from remote locations.

3.1 Special care must be taken with off-site requests for assistance since it is easy to misinterpret voice messages, and text-based communication may need explanations or interpretation.

3.2 Each library should develop information service policies that include provisions for off-site requests.

3.3 Requestors may have to be informed that the library does have information on the topic but that they will need to come into the library to use in-house print and non-print materials and for further research assistance.

4.0 Ethics

4.1 The American Library Association's current Code of Ethics (as stated in the ALA Policy Manual in the ALA Handbook of Organization) governs the conduct of all staff members providing the information service.