

BEST PRACTICES FOR 24/7 REFERENCE COOPERATIVE SESSIONS

1. Picking up Patron

- Check to see if the patron has an asterisk (*) preceding the name; if so, wait at least 1 minute before picking up, to give the local librarian a chance to pick up.
- Keep hold times as short as possible. Patrons should be picked up within 3 minutes.

2. Greet the Patron

- Send a personal greeting, identifying yourself and indicating your willingness to help. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron.

Examples:

"Hello, my name is Mark, and I'm a reference librarian at xxx University. Your library and my library are part of a nationwide cooperative that staffs this chat service. I'm looking at your question right now."

OR

"Hi! Your call has been picked up by a librarian at the xxx service in [name of state]. Your library and my library are part of a nationwide group that provide backup for each other's service. I'm reading over your question and will be with you in just a moment."

3. Reference Interview/Resource Selection

- Conduct an adequate reference interview to understand the question and the patron's information need. Be sure to clarify patron's question before beginning the search.
- Choose resources at the appropriate level for the patron's research. In general, databases are preferable to Google or other general web sources when assisting students with research projects.
- Use the library policy page to find information using home library's resources (including OPAC, databases, and guides).
- Evaluate resources for authority, objectivity, and currency; share with patron.
- Answer questions accurately.

4. Provide professional level search assistance

- Provide context and instruction to the patron, rather than just sharing resources or merely sending web pages. Provide enough guidance so that patron can recreate the search if needed (include the name of links, which one patron should click on, as well as the "click path"). Merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.
- Recommend appropriate search terms and subject headings, in the context of a recommended search statement using Boolean operators. Provide examples of query constructions using basic and advanced Boolean operators.

NOT:

Patron: Need help finding books on the history of black businessmen in New York City.

Librarian: You should search the catalog with keywords like black, businesspeople, entrepreneurs, New York, african americans, history

RECOMMENDED:

Patron: Need help finding books on the history of black businessmen in New York City.

Librarian: You should search the catalog by typing in things like this (exactly as I have them)...

Librarian: african americans and business* and new york

Librarian: or using that last one, replace business* with the word entrepreneur*

- Help patron evaluate the sources for relevancy to topic
- Ask for feedback on resources sent

5. Interpersonal skills

- Create a welcoming atmosphere
- Chat frequently, so patron doesn't have long lags without chat from librarian (no more than 3 minutes should elapse without the librarian sending a message to each patron who is in session, even if it is a simple "I'm still working on your question", or even "Still searching...")
- Show interest in the patron's question through chat tone and choice of words
- Use positive phrasing ("We can..." instead of "We don't/can't/won't...")
- Use scripts appropriately, as needed
- Paste small excerpts of information; avoid pasting long blocks of text in the chat.
- If patron has trouble viewing a web page that you send in chat, try escorting the patron to that page
- Send chats to correct patrons when serving multiple patrons.

6. Concluding the session

- Before closing, ask the patron if their question has been answered ("Does this completely answer your question?") or if they need additional information.
- If the request cannot be adequately answered during the session, code the session for Follow Up (see Resolution Codes, below)
- Before coding for follow up, verify the patron's email address and deadline. It may take several days for the patron to get an answer back from the library.
- If the patron indicates that they need no additional information, send the appropriate Goodbye script provided by the patron's library. If no Goodbye script is available, thank them for using the service and encourage them to return if they have more questions.

Resolution Codes: It is important to use a resolution code to end the session. If no resolution code is selected, then the session is assigned the default code of Answered. Use the codes as follows:

- **Answered:** no additional information is needed by patron.
- **Follow Up by Patron Library:** In most cases, use this code anytime Follow Up is needed.
- **Follow Up by Me:** Only use this code if you (the chatting librarian) have information at hand which will thoroughly answer the question. When you use this code, you are responsible for the follow up. Be sure and either send the follow up through QuestionPoint, or add a note that follow up has been done.
- **Lost Call:** If the patron never responds and does not have an email address. Do not use Lost Call if the patron left an email address; instead, use Follow Up by Patron Library.