

Ask A Montana Librarian Collaborative Reference Service Policies & Procedures

Collaborative reference is the practice of having a group of libraries answer online reference questions through chat and email. In the Montana collaborative reference service, each library staffs the service for one hour per week answering and referring questions as appropriate.

Patrons

The Ask A Montana Librarian service answers questions from Montana residents as well as from those elsewhere who are interested in Montana and Montana-related information. This information will be made available to patrons on the service's website.

Although a participating library's collections and services may be restricted to affiliated users, when a library joins this cooperative it is obligated to provide service to everyone. This does not mean that the library's collections and services must be open to everyone, only that when the library's employees are staffing the service, they must respond to questions from all users, regardless of library affiliation.

Guidelines for appropriate patron behavior are as follows:

“By using this service you agree not to send any question or content that is illegal, harassing, libelous, threatening, harmful, obscene, or otherwise objectionable. You agree not to send any question or content that otherwise violates any applicable local, state, national, or international law.”

Any patron who engages in this behavior should be warned once to act appropriately. Subsequent inappropriate behavior will cause the patron to be banned from using the service; notify the Quality Control Committee as soon as a patron is warned, including the question or email number and a brief synopsis of the incident. If a subsequent incident occurs, send the same information to the Committee so that they can block the person's address and IP.

Patron Privacy Information

This privacy statement is provided to the patrons of the Montana Library Network Virtual Reference Project. Our users can expect the following services and guarantees of confidentiality:

1. Your questions will be answered by experienced reference staff at libraries in the state. We take our duty of patron confidentiality very seriously and will make every effort to respect your privacy and ensure your confidentiality.
2. We ask for a name so we know how to address you. You may enter any name you like.
3. We ask for your email address in order to send you a transcript of your session. Entering an email address is entirely optional, but you will not receive a transcript without giving us a valid email address. This transcript will contain links to the web sites suggested during your session and the complete text of your interaction. No email addresses will be sold or given to any other entities.

4. We collect information about your computer: we note what browser version you are using and what your IP address is.
5. We store your transcripts and your personal information for a limited time so that we can provide you with better service. We purge all personally identifiable information (i.e., the name and email address you provided, browser and IP data) from the system. The text of your interaction may be stored longer. However, please be aware that if you provide personal information in the text of your chat - provide another email address or telephone number for follow-up purposes, for example - that information will remain in the transcript.
6. Only staff who work with the Montana Library Network Virtual Reference Project service have access to your transcript. No one else can access your transcript, including other library staff not directly involved in providing service through the Project.
7. We may forward your transcript to another librarian who may be better able to help you.

Librarians

Collaborative reference requires of library staff many of the same communication and interpersonal skills necessary for other forms of reference. The absence of a physically present patron and the different modes of communication may call for additional skills, effort, or training to provide quality service on par with face-to-face reference services.

Staff should exhibit the professional competencies and behavior essential for successful reference and public services librarians. For guidance, see the Reference and User Services Association's "Professional Competencies for Reference and User Services Librarians" located at <http://www.ala.org/ala/rusa/rusaprotools/referenceguide/professional.htm>. Before becoming a service provider, a reference staff person will receive at least 2 days of training on QuestionPoint and virtual reference techniques. Once they have completed training, staff should be able to demonstrate skills in the effective use of online communication, as well as demonstrate awareness of the common potential problem areas when conducting reference interviews online, as compared to the face-to-face reference interview.

Librarian Privacy

This privacy statement covers *the reference personnel* staffing the Montana Library Network Virtual Reference Project. Our users can expect the following services and guarantees of confidentiality:

1. Virtual Information Desk librarians collect and reply to user questions submitted by various means: via a web form, an interactive chat service, e-mail, or by a phone call.
2. The form used to record questions collects a variety of information about the user: parent school or university of the user (if a student), town, city, or county of residence (if not a student), and library barcode number or ID. The librarians also add statistical information such as type of question,

time taken to answer the question, and time and date the question was submitted.

3. Personally identifiable details such as name, barcode, address, phone number, etc. are deleted from transaction records and posted on a public Knowledge Base, which is used as a resource for librarians and information seekers to review answers to previously asked questions.
4. After personal identifiers have been deleted, collected information from individual transactions is archived and used for project evaluation by the Project Manager.
5. The librarians may share personal information with the parent library of the users only if they are requested to provide additional or follow-up assistance to that individual. The librarians may also share non-personal information with partner libraries in the Montana Library Network Virtual Library Project or the general public only after all personal identifiers have been deleted.
6. If users have questions or concerns regarding this statement or wish to correct any inaccuracies in the Public Knowledge Base, they can contact the Project Manager by e-mailing eharper@msugf.edu.

Communication

Communication among members of the cooperative will be facilitated by a listserv and a website, located at <http://montanalibraries.org/MLNCoopRef/MLNCoopRef.asp>.

The website will serve as a gateway for accessing the service and as a place for staff to find recent cooperative news, meeting calendar, service guidelines, technical support information, administrative policies, links to various reference sites and resources, a list of participating libraries and their electronic resources and subject expertise.

To join the listserv, please see the instructions under Mailing List at <http://montanalibraries.org/MLNCoopRef/MLNCoopRef.asp>.

QuestionPoint has its own user listserv. Instructions for joining it are located at <http://www.questionpoint.org/community/listserv/questionpoint-1.html>.

Handling Queries

All queries should be viewed and dealt with promptly. Show professional courtesy and respect when answering questions, and uphold the principles of intellectual freedom.

Respond to 100% of questions that are assigned, if only to say, *"I'm sorry I don't know, but you can try..."* Avoid yes/no responses. Yes/no's can be interpreted as cold and unfriendly, just as in face-to-face reference.

All questions are dealt with on a first-come, first-served basis, regardless library affiliation or Montana residency status.

Ask A Montana Librarian Policies & Procedures

Patrons usually indicate whether or not they are a Montana library patron. In questions from Montana patrons, the URL for the library's entry in the Montana Library Directory appears above the question. When this URL appears, librarians should always copy and paste it into a new browser window in order to see what library the patron is affiliated with; this helps give more accurate answers and information. Often the entry will include a link to the library's catalog, to its website, and will give telephone and fax numbers and hours of operation. In giving a complete answer to a patron, this information can be very useful.

If a question is clearly intended for a specific library, the librarian can either give contact information for that library or refer the question to the library via Questionpoint if the library is a member of the cooperative.

For questions requiring more in-depth answers, assistance may be provided if appropriate. Search time should be limited to 15 minutes or less. Questions requiring more time should be given sources to find answers, and advised the question requires research beyond the scope of the service.

Answers should generally follow this format. Librarians can customize this and change the wording as they wish.

Heading: Greet patron, include a generic notice of thanks for using the service, refer directly to subject of patron's inquiry: Example: *"Information on _____ may be found _____,"*

To find out more about _____, we would recommend _____"

Body: Cite sources fully, and in a consistent citation style. Describe all materials (if any) sent under separate cover or attached. Explain how the relevant information was found, its placement with regard to the suggested resource, if this is not immediately evident.

Signature: A signature should be a part of every closure. The librarian signature may contain librarian name or initials, title, institution and any contact information, as is prescribed by supervisor. Examples: *"We hope the information we've provided will assist you with your research"; "I hope you find this information helpful"; "We hope this answers your question. If you have further questions, please contact us again and we will be glad to provide additional assistance..."*

Email Questions

Email questions should be answered within 24 hours. An answer can be a request for clarification or more information, but ideally should be an attempt to answer the question or a referral to someone who can answer it. If a question is referred to another library or librarian, it should be answered within 24 hours of receiving the referral.

Questions which are referred and answered will reappear in the New questions list. The original librarian who referred the question is responsible for editing the answer received and sending it on to the patron within 24 hours of receiving the answer. Once the answer is edited and sent, the question should then be closed by the librarian who originally claimed the question.

Chat Questions

Chat patrons should be acknowledged as soon as they appear, greeted by name, and told whom they have contacted (“Welcome to Ask A Montana Librarian”). Librarians can choose whether to introduce themselves by name, whether to disclose where they’re working, and any other usual information.

Librarians should try to use reference interview techniques as much as possible. The chat environment is very informal, but it cannot be assumed that the initial question a patron asks is the question to which he really wants an answer. Use a neutral questioning interview technique to determine *“the real question,”* and once this is determined, provide users with accurate answers, appropriate in length, level, and completeness to the need. Include notification that the question may be forwarded to consortial partners, if this is the case.

As the librarian searches, he should periodically reassure the patron that they have not been disconnected. This can be done by apprising them of the progress of the search or by just popping up and saying that the librarian still looking or is typing—whichever is comfortable or seems appropriate.

When an answer is given, the librarian should always ask if the patron has any further questions or whether the answer given was complete enough or the answer needed. It’s up to the librarian what to ask and how to word it.

In the case of a second chat patron coming in, the librarian should greet the second chat patron, tell them how long the wait might be, and then either finish the transaction with the first patron or begin assisting the second patron as soon as possible.

When any transaction, whether chat or email, is finished, the question should be removed to the Closed question list. If the patron returns later with further questions, librarians should check the closed question list for the previous inquiry. Questions should not be left in the Active or New question list for longer than 24 hours.

Answering Reference Questions

Practice good search strategies, and as stated above, respond to 100% of questions that are assigned, if only to say, *“I’m sorry I don’t know, but you can try…”*

Maintain objectivity and do not interject value judgments about subject matter or the nature of the question into the transaction.

Promote information literacy by providing patrons with information on how you found an answer to their question. All answers should have a cited source, whether it’s the Encyclopedia Britannica, MSN, or the librarian’s own personal knowledge. Patrons should know where their information is coming from and how credible or reliable the

source. Where possible, complete information should be given, such as a formatted citation to a book or article, or a link to a website.

In QuestionPoint, all links should be formatted as < <http://www.google.com> >. Note the spaces between the bracket and the address, and the inclusion of http:// in front of the address. This ensures that the link is live when sent as part of an email. When formatted this way in a chat, it allows a new window to open on the patron's computer when the chat message is sent; it also ensures that the link will be live in the chat transcript that is sent to the patron after the chat session is over.

Electronic Resources

Queries about whether a library has access to a certain database or book should be answered if at all possible. Check the library's catalog or WorldCat to see if the library owns the book; but do advise the patron that he should call or visit the library to place a hold on it or pick it up. If the inquiry is related to an interlibrary loan request, advise the patron to place the request with his home library and let them find it for him.

In academic libraries a list of available databases is usually linked on the library's homepage; but remember that these resources are usually restricted to the library's own users. Advise the patron to call the library to ask about community access.

Interlibrary Loan

Normal interlibrary loan protocol should be followed; for example, if a patron is requesting an interlibrary loan, he should be referred back to his home library to request the book just as he would be if he were calling the library who owned the book, or came into that library to request it. Patrons should not be told to contact the library owning the book. If it is a case where the patron has already tried to request the book and cannot get it through interlibrary loan, he should be referred to a bookseller such as Amazon (for recent titles) or Alibris/Powell's (for out of print titles).

Medical/Legal/Valuation Queries

Sources only should be provided for the following types of questions:

- Medical or law-related questions (including patents and trademarks)
- Used car values
- Crisscross or reverse telephone directory information
- Product evaluations
- Contest or puzzle questions

Be very cautious about providing information on the value of anything; it's usually better to refer the patron to books or other resources on the subject than to recommend a dealer or other expert.

Genealogy Queries

Genealogists are great internet users and great library supporters. But genealogy is in-depth research requiring patience, time, and frankly, money. Its practitioners are frequently (but by no means always) elderly, and may have restrictions on their ability to find and access materials.

We do not do research. In genealogy, this can include looking up obituaries or other information, providing copies of materials, or doing internet searches for information. Usually genealogists using our service should simply be referred to the library located nearest the geographic location in which they are interested. Local libraries will usually have the resources or know how to find them. If a query about the resources of one of the cooperative libraries is received, or if a genealogy question best answered by one of the librarians involved in Ask A Montana Librarian comes in, before referring the question to the library, contact the library and ask how they want to handle the question. It may be preferable to give the patron the library's contact information and have them contact the library directly. Some libraries, however, may prefer to have the question referred to them in QuestionPoint so that they can answer it and return it to the librarian who originally picked up the question. It may also be preferable to leave the question unassigned and have a librarian from the library concerned pick it up and answer it directly.

The following message is included on the Ask A Montana Librarian website:

“We are happy to assist you in finding resources and materials, and to refer you to libraries and other institutions which hold those items. Please note that we are not responsible for the policies and charges of these other institutions. Note that we do not make copies or do searches or research ourselves.”

Governance

Montana's Ask-a-Librarian service will be a formal, independent, self-governed consortium. It will make consensus decisions in face-to-face and online meetings. The Executive Board will run things day-by-day, this Board will have administrative duties and powers.

~~The Montana Library Network Virtual Reference collaborative is managed by a Steering Committee with the assistance of these subcommittees. The Steering Committee is comprised of the Chair from each subcommittee, the two regional representatives, and a representative from the Montana Library Network.~~

Finance: Jan Jelinek, Chair, Gloria Langstaff, Cynthia Harrison

Marketing: Sheila Bonnard, Chair, Anita Scheetz, Donna Worth, Sara Groves (non-voting)

Statistics and Quality Control: Liz Babbitt, Chair, Betsy Garlish, Samantha Hines

Training: Brent Roberts, Chair

Scheduling: Liz Babbitt, Chair, Trish Browning

Website: Martha Thayer and Samantha Hines, co-Chairs

Libraries wishing to participate will sign a Memorandum of Understanding stating their commitment to at least 2 years of participation in the cooperative virtual reference pilot project.

Finances

Ask A Montana Librarian is funded by a sliding scale based on a library's service population and FTE staff. Funding covers the subscription to the QuestionPoint software as well as training, meeting, and marketing costs for the cooperative and its members. Finances are handled on a fiscal year basis. Accounting is handled by the executive director of the Montana Library Association, Eileen Casey.

All questions about finances should be referred to Jan Jelinek at jelinekj@rocky.edu.

Staffing

Every library in the cooperative is expected to contribute at least one (1) hour a week to the staffing of Ask A Montana Librarian. This hour can be at any time during the agreed-upon hours of service, and for libraries which do not have high-speed internet connections, it can be email-only. If a library provides email-only service, however, it must be done at a time other than the posted hours for chat service (e.g. if chat runs 8 AM to 5 PM Monday-Friday, the email-only service must be before 8 AM, after 5 PM or on the weekend.)

Because this is a public service and a part of reference service at many Montana libraries, it is essential that the service be fully staffed during all posted hours. If a librarian cannot be present, it is the combined responsibility of the librarian and the library to find a replacement. This can be done by contacting another librarian or library directly or by putting a request on the cooperative's listserv. If a replacement cannot be found by either of these methods, the scheduling coordinator should be contacted.

Librarians should log into chat on time or slightly before, to ensure continuity of service. If a librarian or library is consistently late, or if a library or librarian fails to show up for two or more shifts, their privileges may be suspended and their desk time assigned to another library, at the discretion of the steering committee.

All questions about staffing and desk/time assignments should be referred to the scheduling coordinator, Liz Babbitt, at lbabbitt@mtlib.org.

Training

Librarians staffing the Ask A Montana Librarian service receive two distinct types of training. The first is software training provided by the vendor. This training generally covers the basics of how to log into and navigate the software, and how to answer questions, chat, and move questions and answers around within the program. Software training is provided as needed, but usually when there are enough new libraries and staff members to warrant it. Usually a single time and place will be agreed upon for

efficiency. When the software changes substantially, software training for all Ask A Montana Librarian staffers will be negotiated as part of the package.

The second type of training is reference training provided by the cooperative. This training uses the Anytime, Anywhere Answers curriculum developed by the Washington State Virtual Reference Consortium. This training emphasizes how staff members can take their current reference skills and apply them online in email and chat reference, as well as how to integrate collaborative reference into their regular reference desk work. The training takes place in groups of ten, starting with a one-day in-person orientation and followed by five weeks of readings, assignments, and once-a-week online discussions. Each library has a copy of the accompanying book, and all librarians providing reference service through Ask A Montana Librarian should go through this training.

All questions and comments about training should be directed towards Brent Roberts at broberts@msubillings.edu.

Quality Control

As outlined in the section “Answering Reference Questions”, we strive to maintain a professional and reliable service for all Montanans. It is the responsibility of the librarians staffing Ask A Montana Librarian to ensure that their answers are accurate, factual, and complete to the best of their knowledge, so as to maintain the integrity of the service. By following the guidelines above, all librarians should be able to provide great service without undue difficulties.

Regular patron and staff surveys will be undertaken by the Steering Committee to assess the service, as well as patron and staff satisfaction. In addition, at regular quarterly meetings the Quality Control committee will lead transcript analysis and discussion sessions. Transcripts from the service, with all identifying information about the librarian and patron stripped out, will be used, so that the staff can see how the service as a whole is doing, as well as seeing actual questions and exchanges dealt with by their fellow librarians.

For questions and comments about quality control, please contact Liz Babbitt, at lbabbitt@mtlib.org