

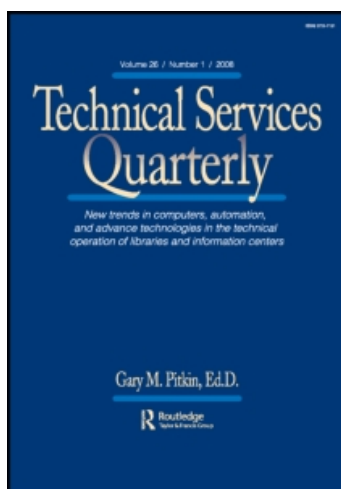
This article was downloaded by: [Hodges, Alex R.]

On: 21 May 2009

Access details: Access Details: [subscription number 911588154]

Publisher Routledge

Informa Ltd Registered in England and Wales Registered Number: 1072954 Registered office: Mortimer House, 37-41 Mortimer Street, London W1T 3JH, UK



Technical Services Quarterly

Publication details, including instructions for authors and subscription information:

<http://www.informaworld.com/smpp/title~content=t792306978>

IM is for Instant Millennials: Developing Staffing Models and Best Practices for Instant Messaging

Alex R. Hodges ^a; Meg Meiman ^b

^a American University, Washington, DC ^b University of Delaware, Newark, DE

Online Publication Date: 01 January 2009

To cite this Article Hodges, Alex R. and Meiman, Meg(2009)'IM is for Instant Millennials: Developing Staffing Models and Best Practices for Instant Messaging',*Technical Services Quarterly*,26:3,199 — 206

To link to this Article: DOI: 10.1080/07317130802520203

URL: <http://dx.doi.org/10.1080/07317130802520203>

PLEASE SCROLL DOWN FOR ARTICLE

Full terms and conditions of use: <http://www.informaworld.com/terms-and-conditions-of-access.pdf>

This article may be used for research, teaching and private study purposes. Any substantial or systematic reproduction, re-distribution, re-selling, loan or sub-licensing, systematic supply or distribution in any form to anyone is expressly forbidden.

The publisher does not give any warranty express or implied or make any representation that the contents will be complete or accurate or up to date. The accuracy of any instructions, formulae and drug doses should be independently verified with primary sources. The publisher shall not be liable for any loss, actions, claims, proceedings, demand or costs or damages whatsoever or howsoever caused arising directly or indirectly in connection with or arising out of the use of this material.

IM is for Instant Millennials: Developing Staffing Models and Best Practices for Instant Messaging

ALEX R. HODGES

American University, Washington, DC

MEG MEIMAN

University of Delaware, Newark, DE

Shifting American University's virtual reference service model from a consortial, vendor-based endeavor to an institution-only commercial instant messaging service required a team effort. This necessary service and resulting organizational change was comprised of nimble players (reference providers) and flexible management (administrative oversight). Performance guidelines were adapted from the vendor chat experience. Instant messaging service training required modifications to our library's internal communication and development of staff performance guidelines, as well as the creation of innovative management workflow solutions. This article describes how instant messaging reference service shook up our organization and made the sharing of training best practices an organizational norm for cross-functional endeavors.

KEYWORDS *best practices, instant messaging, organizational change, virtual reference*

Over the past few years, instant messaging (IM) has been widely adopted by academic libraries, either in conjunction with other virtual reference services or as a replacement for vendor software programs. This has prompted a growing body of literature about staffing, training, and evaluating virtual reference services. Yet, little has been written about how developing best practices for IM can lead to organizational change within libraries. The purpose of this article is to outline one university library's development of best practices for IM, describe how these practices can be used to foster

Received 19 December 2007; accepted 29 January 2008

Address correspondence to Alex R. Hodges, American University Library, 4400 Massachusetts Ave. NW, Washington, DC 20016. E-mail: hodges@american.edu

greater collaboration among service providers across several departments, and discuss how to establish such sharing as an organizational norm.

LITERATURE REVIEW

There is limited literature specifically addressing the ways in which staffing, training, and evaluation explicitly relate to and inform the development of best practices for virtual reference (particularly instant messaging), as well as the implications such best practices have for organizational behavior and organizational change within academic libraries. However, the literature on staffing, training, and evaluating virtual reference services from a practical standpoint is extensive and includes numerous books and articles addressing these and other issues for libraries interested in starting and sustaining a virtual reference service.¹

Likewise, a growing segment of library literature outlines the reasons for many academic libraries' shift from Web-based chat services to instant messaging (IM) services, or describes the adoption of multiple synchronous reference services and resulting effects on staffing and training.² According to Ward and Kern, transcript analyses of their library's IM service revealed more subject-based research questions directed to IM than to vendor-based software, which "has some staffing and training implications, as subject-based research questions often require more lengthy reference interviews than known-item or information/directional questions in order to fully understand the patron's question."³ This connection among evaluation, training, and staffing as they relate to best practices and organizational change necessitates further exploration, particularly given the practical matter of staffing that many libraries face.

With regard to staffing, Steiner and Long discovered, in their 2005 survey of academic librarians' opinions about IM, that staffing is one of the most frequently cited challenges in maintaining an IM service.⁴ Jana Ronan echoes this concern in her book, *Chat Reference*, asserting that "personnel selection is critical to the success of an online live reference service, and ... several questions should be considered in decision-making. What competencies are realistic to require of real-time reference staff, given the pool of personnel to draw upon? Which skills will staff acquire via training? Will staffing be limited to professionals possessing a degree in library science?"⁵ Ronan's questions address staffing more from the perspective of quality (ensuring good service via training) rather than quantity (having enough people to staff IM), but her focus on the relationship among staffing, training, and performance guidelines reveals how contingent the latter two are upon the former. A training program for IM that establishes performance guidelines ensures there will be enough qualified staff to provide IM service. Ronan identifies two dominant models for staffing chat reference in academic libraries: recruiting

volunteers from an existing reference staff, or adjusting librarians' reference duties to incorporate virtual reference desk hours.⁶ We would argue for a third model: incorporate library staff—librarians *and* non-librarians—from departments outside reference.

The literature on the use of non-librarians reveals an intense debate about levels of service and the nature of the library profession, but as Mozenter, Sanders, and Bellamy state, “whether the trend is based on qualitative, service-based judgments or on shrinking budgets and smaller professional staffs, if the result is expanded use of non-librarians, the issue of training becomes paramount.”⁷ Moreover, the use of performance guidelines or best practices for both training and performance evaluation within the context of IM can address concerns behind each of these trends, improve the quality of service provided to users, and alleviate staffing shortages by increasing the pool of service providers.

Morin underscores this idea in her discussion of best practices in the virtual reference environment. In her chapter, “Approaching Best Practices and Guidelines for Virtual Reference,” she states that best practices “outline a process, practice, or method that can improve effectiveness and efficiency in several situations. One reason to create best practices and guidelines is to help collaboration . . . help delineate tasks . . . set expectation levels clearly, smooth staffing transitions, and identify gaps in understanding.”⁸ Moreover, developing best practices can lead to the kind of meaningful assessment that Bell alludes to when he asks, “Is it possible to develop specific outcomes related to the adoption of the new technology that can be measured and evaluated?”⁹ The answer, we contend, is that it is not only possible, but also necessary, given practical issues of staffing and training, as well as more qualitative issues such as providing superior levels of service. Best practices, in short, should ideally be used not only for creating performance measures for assessment, but also as the basis of an IM training program.

While creating and implementing best practices entails establishing agreed-upon competencies, it also involves working with the actual output of the IM service: transcripts. Within the field of virtual reference, using transcripts for training and evaluation has been well-documented in the literature.¹⁰ Ward's seminal article on using transcripts for staff training is one of the best examples, as it outlines his use of the Reference and User Services Association guidelines for behavioral performance to analyze Web-based chat sessions, and provides data that demonstrates the viability of transcripts in aiding staff training in reference interview skills. More importantly, his views on training parallel those of Mozenter's: Ward states, “The need for correct behaviors [in a reference interview] is emphasized when libraries train non-librarians or students for reference desk work.”¹¹ Again, this link among “correct behaviors” (performance guidelines), evaluation, and training for non-librarians as well as professionals underscores the vital importance and value of best practices for a library's organization.

Yet, best practices—and possibly, instant messaging itself—can also be used for effecting organizational change. By using these practices to train non-librarians for IM, and by sharing these practices among public service departments within a library, librarians increase the possibility of collaboration among public service departments and promote the act of collaboration itself as an organizational norm. Collaboration, of course, relies on an amenable organizational culture, whether a library's organizational structure is hierarchical, team-based, or “flat,” and collaboration also presumes a willingness on the part of administration to accept ideas from library staff.

Steiner and Long allude to this final point when they describe the results of their survey question about how IM originates at most libraries. Of the 57 libraries offering IM, they state that “48 started their service as the result of the efforts of one librarian. *In most cases, the concept emerges from the library staff rather than from the administration*” (emphasis added).¹² Although this is only one survey, it suggests that IM is, in some ways, a “grass-roots” form of reference, with the idea, implementation, and [in the case of American University (AU) Library] the entire program emerging from the ground up rather than the top down.

BACKGROUND

From 2002 to 2006, AU librarians contributed service hours to the Washington Research Library Consortium's (WRLC) virtual reference collaboration. During this time, the WRLC migrated across several vendor-based platforms: LSSI, Tutor.com, and QuestionPoint's 24/7 Reference Service. Our WRLC partners included the Catholic University of America, Gallaudet University, George Mason University, the George Washington University, Marymount University, and the University of the District of Columbia. By 2005, commercial instant messaging had been reported widely on a national level to be a successful complement to, or substitution for, vendor-based virtual reference platforms. Throughout the duration of the collaboration, WRLC librarians reported widespread frustration with the vendor platforms.

In anticipation of the collaborative service's cancellation, AU librarians created a parallel IM reference pilot during the spring of 2006. Simultaneously, other WRLC schools also began their own institution-supported IM reference services. Librarians at AU expressed their satisfaction with this new service model, as did librarians at the other schools.

The consortium discontinued collaborative virtual reference service after spring 2006. In order to transition to the new IM service model, AU's service coordinators created new training initiatives and management workflows for its librarian and non-librarian service providers. During the WRLC collaborative model, librarians from across the consortium assessed service provision

by reviewing sampled transcripts. AU librarians adapted a similar transcript evaluation process to support its development of service best practices for its training efforts.

DEVELOPMENT OF BEST PRACTICES

Staffing

Consortial collaboration among the WRLC libraries provided almost 70 professionals who could staff the service's hours. Switching to a locally staffed service naturally proved to be challenging because the number of library reference professionals at AU comprised only a fraction of our consortial whole. Additionally, few library staff from outside of the team of reference librarians traditionally staffed the physical reference desk. Finally, scheduling and staffing another service in addition to the reference desk seemed daunting, especially because our reference team chose not to centralize the IM service from the reference desk. Thus, the genesis of incorporating other library personnel—that is, non-librarians enrolled in MLS programs, others who had advanced subject knowledge, and librarians outside of reference—resulted from the need to cover both in-person and online reference simultaneously with a limited number of possible service providers.

Service coordinators and library administrators recognized these staffing concerns, viewing them from the perspective of a team-based approach—which is why AU Library had developed its team-based environment in the first place. Not only does the team-based environment help individuals reach their potential by providing multiple cross-training opportunities, but it also helps the library structure sustain itself by encouraging its finite number of staff to increase their participation and sense of responsibility for library-wide initiatives. Once library staff answered the call for participation, the IM service coordinators worked closely with interested staff and their administrative heads to ensure that service provision of one hour per week would not adversely affect their primary responsibilities.

Training

The service coordinators borrowed from the experience of evaluating virtual reference transcripts and used many of those transcripts, in addition to some transcripts from our IM pilot experience, to identify examples of the established best practices. These examples provided valuable demonstrations of reference interviews for the IM trainees during their training process. Other aspects of training involved in-person reference desk shadowing, the completion of task-based reference questions relative to the AU curriculum, introductions to core databases, Web resources, and standard print reference

materials, as well as overviews of designed service procedures (e.g., signing in to the service, practicing the reference interview via IM, establishing an immediate rapport with clientele, etc.).

In order to accomplish this mini-course on reference service, each trainee was assigned a mentor librarian, who also doubled as one of the service coordinators. The mentor guided the trainee through six weeks of practice and shadowed the trainee in preparation for service provision for fall 2006. In order to better organize the training process, IM coordinators also designed an online course and syllabus to be completed by trainees over the summer of 2006. The coordinators developed this course space through Blackboard, AU's course management system, which housed course materials, service policies—including guidelines for referrals from one service desk to another—and training procedures. This online component also functioned as a repository for the service's history and provided the coordinators with yet another communication method to express service updates (look at past and current schedules, swap IM service hours, etc.). Toward the end of summer and midway through fall 2006, the service coordinators evaluated IM trainees on the helpfulness of the training program, asking for feedback regarding different aspects of training. During the fall semester, mentors met with trainees on a regular basis to review trainees' transcripts and discuss any questions or concerns trainees had about providing IM service.

Evaluation

These training and evaluation practices remain in place as of spring 2008. Over time, the coordinators have hosted group feedback forums to allow for the sharing and discussion of service experiences. This practice has provided an additional important viewpoint of our evaluation of training and performance: Service participants tell us what additional training they believe they require. This practice of reflective discussion allows these sessions to remain trainee-centered, and the knowledge of service provision that we discuss together seems commonly owned rather than dictated in an overly didactic, top-down approach.

Still, these logs provide an ample source of discussion material, which is used during group and one-on-one training. Within the transcripts, we observed several factors. We do gauge accuracy of answers provided, but, more importantly, the iterative process returns us to the outcomes established by the best practices document. Thus, we are mining the transcripts for reference-interview completion, step-by-step instructions, and appropriate referrals to source materials and human resources, all of which are outlined in the best practices.

Mentors and trainees work together during the trainees' first few weeks of service provision. The mentor acts as cheerleader and resource for reference or technological support. Developing this relationship establishes

trust and camaraderie, which are both traits librarians want to instill in their potential colleagues. We argue this time-consuming practice adds value to our profession: it reinforces our professional obligation to collaborate with non-librarians (which, in turn, often encourages them to join our profession), and it reveals how the culture of assessment in higher education and libraries positively reinforces collaboration and active learning among all library staff as a means of maintaining quality service.

IMPLICATIONS FOR ORGANIZATIONAL CHANGE

Steiner and Long's discovery that many IM services emerged from library staff rather than from administration hints at the sort of organizational change that IM can effect, and correlates with our experience at AU, where librarians initiated an IM pilot and developed it into a flourishing service with its own training and evaluation parameters. This grass-roots approach in initiating a new reference service, in addition to AU's staffing model for IM (cross-training librarians, the use of non-librarians for IM), as well as our use of best practices as performance guidelines, which were developed by librarians and library staff, point toward an organizational change that results in the development of common professional values across the library's various function units. For example, the Media Services and Music Library units within the AU Library system adapted the IM best practices for its own reference services, and these practices continue to serve as performance guidelines for all library staff participating in IM.

Of course, this kind of organizational change relies somewhat on a library's organizational culture; AU's team-based structure allows for a fair measure of teamwork independent from library administration, with performance parameters determined and maintained by IM service providers. Yet, equally, or perhaps more important than a library's culture, is its openness to the idea of using performance guidelines for library staff to ensure staff buy-in to enhance training—all of which serves the user well, our ultimate goal. With a system that allows trainees to evaluate the quality of their own training, as well as encourages everyone (librarians included) to have their work evaluated within the context of established best practices, IM service at AU Library has catalyzed change among departments, compelling public service desks to collaborate more with each other, prompting us to provide consistently high-quality service to our community, and instigating cross-departmental use of best practices and performance guidelines.

NOTES

1. A few of the more well-known books in this field include Coffman, Steve. *Going live: Starting & running a virtual reference service*, Chicago: American Library Association,

- 2003; Hirko, Buff, and Mary Bucher Ross. *Virtual reference training: The complete guide to providing anytime, anywhere answers*, Chicago: American Library Association, 2004; Kovacs, Diane K. *The virtual reference handbook: Interview and information delivery techniques for the chat and e-mail environments*, New York: Neal-Schuman, 2007; Lipow, Anne Grodzins. *The virtual reference librarian's handbook*. Berkeley, CA, New York: Library Solutions Press, Neal-Schuman, 2003; Lipow, Anne Grodzins, and Steve Coffman. *Establishing a virtual reference service: VRD Training Manual, LSSI's VRD (virtual reference desk) software, service policies and guidelines, design and content of screens*. Berkeley, CA: Library Solutions Press, 2001; Meola, Marc, and Sam Stormont. *Starting and operating live virtual reference services: A how-to-do-it manual for librarians*, vol. 118, New York: Neal-Schuman, 2002; Jana Ronan. *Chat reference: A guide to live virtual reference services*. Westport, CN: Libraries Unlimited, 2003. See also James Corey Tucker's (2003) article "Developing a Chat Reference Training Program." *Internet Reference Services Quarterly*, 8, 11–25.
2. See in particular Sarah Steiner and Casey Long's (2007) article "What are we afraid of? A survey of librarian opinions and misconceptions regarding instant messenger." *The Reference Librarian*, 47, 32; and David Ward and M. Kathleen Kern's (2006) "Combining IM and vendor-based chat: A report from the frontlines of an integrated service." *Portal: Libraries and the Academy*, 6, 427.
 3. Ward and Kern's "Combining IM and vendor-based chat," p. 427.
 4. Steiner and Long's "What are we afraid of?" pp. 43–45.
 5. Ronan's, *Chat Reference*, p. 38.
 6. Ronan, p. 39.
 7. "Cross-training public service staff in the electronic age: I have to learn to do what?" (2003). *Journal of Academic Librarianship*, 29, 399.
 8. Morin (2004) in "The virtual reference experience: Integrating theory into practice." *The Virtual Reference Desk Series*. New York: Neal-Schuman, 2004, p. 186.
 9. "Pencils never crash: The thoughtful integration of technology for reference service." (2007). *The Reference Librarian*, 47, 127.
 10. See in particular David Ward's (2003) "Using virtual reference transcripts for staff training." *Reference Services Review*, 31, 46–56. See also Marie Radford's (2006) "Encountering virtual users: A qualitative investigation of interpersonal communication in chat reference." *Journal of the American Society for Information Science and Technology*, 57, 1046–1059; Radford's (2006) "The critical incident technique and the qualitative evaluation of the connecting libraries and schools project." *Library Trends*, 55, 46–64; Lankes' (2004) "The digital reference research agenda." *Journal of the American Society for Information Science and Technology*, 55, 301–311; Julie Arnold and Neal Kaske's (2005) "Evaluating the quality of a chat service." *Portal: Libraries and the Academy*, 5, 177–193; Marilyn White, Eileen Abels, and Neal Kaske's (2003) "Evaluation of chat reference service quality." *D-Lib Magazine*, 9, available online; and Tucker's "Developing a chat reference training program," pp. 20–22.
 11. Ward's "Using virtual reference transcripts for staff training," p. 46.
 12. Steiner and Long's, "What are we afraid of?" p. 39.