

Virtual Reference Adventure: Choose Your Own Experience

How do you assess your reference interview skills in the chat reference environment?

The RUSA [Guidelines](#) can be applied to any reference transaction. In June 2004, the Guidelines were revised to address “remote” reference interactions such as telephone, chat and instant messaging, where traditional visual and non-verbal cues do not exist.

With several of your chat transcripts, assess the effectiveness of your virtual reference interactions using questions based on the RUSA Guidelines.

APPROACHABILITY

- Did you use a friendly greeting to initiate the reference conversation?
- Did you acknowledge others waiting for help and use a triage approach if necessary?

INTEREST

- Did you convey interest in the patron's question?
- Maintain a steady flow of contact with the patron by sending written or prepared messages?
- Did you signal an understanding of the patron's information need through brief comments or questions?

LISTENING/INQUIRING

- Did you communicate in a receptive, cordial, and encouraging manner, using written language appropriate to the nature of the transaction?
- Did you encourage patrons to state fully their information needs in their own words?
- Did you rephrase the question and ask for confirmation to ensure understanding?

- Did you use open-ended questions to encourage the patron to expand on the request or present additional information?
- Use clarifying questions to refine the search query?
- Did you maintain objectivity, not interjecting value judgments about subject matter or the nature of the question?

SEARCHING

- Did you ask what patrons had already tried, and encourage them to contribute ideas?
- Did you construct a competent and complete search strategy?
- Explain the search strategy and sequence to the patron?
- Work with the patron to narrow or broaden the topic if too little or too much information was identified?
- Did you conduct the search within the patron's desired time frame?
- Did you ask the patron if additional information was needed after an initial result was found?
- Did you make arrangements, when appropriate, to further research a question and send a response via email?
- Did you recognize when to refer the patron's question to a more appropriate library, subject expert, or other resource?
- Did you explain how to use sources when appropriate?
- Offer pointers, detailed search paths, and names of resources used, so that patrons can learn to answer similar questions on their own?
- Did you use appropriate technology (such as co-browsing, scanning, faxing, etc.) to help guide patrons through library resources, when possible?

FOLLOW-UP

- Did you ask patrons if their questions were completely answered?
- Encourage the patrons to return to the chat reference service if they have further questions?
- Were you careful not to end the reference interview prematurely?
- Did you suggest that the patron visit or call the library when appropriate?
- Did you thank the patron for using the service?

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