Virtual Reference Adventure: Choose Your Own Experience

The creation of a transcript for every chat reference transaction provides unique tools for evaluation. These transcripts can be used for self-assessment or for peer review. However they are used, they become valuable tools for improving the skills of virtual reference providers, as well as for increasing the effectiveness of the service.

Here is an example of how a virtual reference peer review process is used at the Seattle Public Library. The Sound Libraries Information Consortium developed this process with the assistance of Matthew Saxton at the University of Washington Information School.

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"Show Me Yours... and I'll Show You Mine!"

Implementing Peer Review

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Preparing for the Peer Review Session

You will need a room where 8-10 people can sit comfortably and have a discussion. The meeting will last about two hours.

Arranging the Meeting:

- ❑ Introduce the concept to decision makers
- ❑ Select and schedule 8 –10 staff members for a two hour meeting (no managers)
- ❑ Choose a facilitator
  - Choose an external facilitator who knows about reference work. This could be a librarian from another institution, a retired librarian, or a faculty member from a nearby library and information science school.

Documents: *One copy per participant and facilitator.*

- ❑ Agenda
- ❑ Reference Criteria & Questions
- ❑ 10 Transcripts
  - Remove identifying patron and librarian information.
  - Select reference transactions/transcripts completed by staff members who will be participating in the peer review session. Selected reference transcripts should be complete.
- ❑ Feedback Form

Transcript / Reference Interview Criteria

Salutation / Interest:
- Librarian opened with a welcoming or encouraging greeting.
- Librarian expressed interest in the question and the patron's problem.

Acknowledgment of Question / Clarification / Answer:
- Librarian acknowledged the question being asked.
- Librarian attempted to clarify the question.
- Librarian demonstrated an understanding of the question being asked by restating it or referring to specific details in the answer.
- Librarian fully responded to the question or referred the question or patron to another agency.

Cite the Source / Instruction:
- Librarian cited the source used to answer the question.
- Librarian instructed the patron in how they found the information.
- Librarian explained the search strategy for the patron or recommended options for further research.

Closing:
- Librarian closes with signature or department information.
- Librarian asks patron if the information fully responds to their question.

Reference Interview Criteria	Yes	No	Unsure
Welcome			
Questioning (Open)			
Clarification of Question			
Searching (Progress or Referral)			
Cite Source			
Follow Up & Closing			
Was the Query Answered Well?			

Form used by King County Law Library in quarterly peer review.

Peer Review Questions

1. Do you like the opening? Is the opening inviting and welcoming?
2. Did the librarian understand the question? What clarifying questions would you like to ask?
3. Did the librarian answer the user's question completely? Was anything left out?
4. Did the librarian cite their source(s)? Did the librarian explain where the information came from?
5. Do you like the closing? Did the librarian invite the user to return in the future? Did the librarian verify if the question was answered?
6. Overall, is there anything that you like or dislike about this transaction?

Feedback

1. Did you learn anything from this exercise? What was the best part of our discussion today?

2. Would you like to do this kind of group review and discussion on a regular basis (2-3 times a year)?

3. Do you have any suggestions or comments to improve this review process?

Tips for Introducing Peer Review

Begin with a general introduction about the purpose:

"Welcome! Today we're going to be looking at transcripts of reference transactions. These transactions have been completed by you and your colleagues here today. The purpose of reviewing these transactions is to give us a chance to discuss how we do reference and to learn from one another's examples. These transcripts have not been selected because they were particularly strong or particularly poor, but rather because they were more complex than usual and will give us more to talk about as a group. As you review each transcript, you'll be asking yourself, "Is this how I would have handled it?" You'll see different techniques and sources you would not have thought of. This is also a chance for you to receive feedback from your peers in terms of what they admire or what they would change in how your transaction was conducted."

Review the criteria for a good transaction:

Use either the RUSA guidelines or the library's own locally adopted guidelines for reference service.

Conclude with a general summary: "In short, think about the reference transaction in four parts: the opening, acknowledging the question, providing a response, and the closing. Go with your gut first - what do you like or dislike about this transaction?"

Review the rules:

"Each transaction was conducted by someone in this room. Bear this in mind—be careful not to be insulting, judgmental, or make fun of the transaction—focus your comments on what you would change in your approach, other alternatives the librarian could have considered, and what you admire about the transaction."

“Each transaction is anonymous. If you know who conducted the transaction, just keep it to yourself. As the discussion goes on, some of you may choose to reveal that this is your transaction - that's okay!”

"It's okay to ask questions of the group. For example, 'Do you think the librarian gave too many sources in their response? I think this might have been confusing to the reader.' We're here to learn from one another and to hear each other's opinions."