

**Launching Chat Service During the Pandemic:  
Inaugurating a New Public Service Under Emergency Conditions**

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# **Launching Chat Service During the Pandemic:**

## **Inaugurating a New Public Service Under Emergency Conditions**

### **Abstract**

**Purpose:** This article details the implementation of a live online chat service which was suddenly necessitated by the worldwide COVID-19 pandemic. The approaches used to train chat operators during this time inform both current and future training initiatives toward continuous improvement in this academic library setting.

**Design/Methodology/Approach:** Chat transcripts from the period of March 2020 – April 2021 serve as the dataset for this study.

**Findings:** In bringing a live chat service online during a global pandemic, chat transcripts from this period reveal 19.3% of all chat interactions related directly to COVID-19. The transcripts also reveal the types of questions, whether reference or directional, and these, combined with staffing patterns, indicate that staff were addressing reference questions more often than librarians. In addition, 25.2% of all transactions, whether by staff or librarians, resulted in tickets or referrals to hand off the question to a subject or functional specialist. These findings help to inform targeted face-to-face refresher training for chat operators.

**Originality:** While bringing a live chat service online is certainly not novel, the impetus behind the quick setup was. This unusual circumstance allowed for an in-depth look at the nature of chat and its training requirements and limitations due to campus stay-at-home orders. It also provided a new understanding that influenced subsequent face-to-face trainings.

**Keywords:** Chat, Reference, Training, Best Practices, Staffing, Librarians, COVID-19

### **Introduction**

Reference is a key component of an academic library's service portfolio; for some, it may even be the first aspect that comes to mind when considering services offered by the library. The Reference and User Services Association (2008, September 29) defines reference work as "reference transactions and other activities that involve the creation, management, and assessment of information or research resources, tools, and services." As a defining characteristic of libraries, reference services have been particularly impacted by the digital age. Technology has allowed for the implementation of virtual reference services that boast instantaneous answers akin to what a user might experience when approaching a physical service desk and interacting face-to-face (Rettig, 2006). While technology has enabled "real time" engagement between a user and the librarian or library staff member, user expectations have also been enhanced by technological progress over the past decades and it is imperative that these user needs for chat interactions are understood in order to continue to provide a worthwhile virtual reference service (Tyckoson, 2012).

This article details the implementation of a chat service which was suddenly necessitated by the worldwide COVID-19 pandemic. While bringing a live chat service online is certainly not novel, the impetus behind the quick setup was. Most libraries would institute some pre-planning measures and develop a reasonable timeline to implement a new public service - a luxury not afforded by the nature of this emergency situation. Furthermore, the unprecedented environment caused by the pandemic provided a unique opportunity for expedited, online-only training for librarians and staff in using the service, something that would have undoubtedly been conducted face-to-face if circumstances had allowed. A description of the timely implementation of chat follows, along with a review of current practices considered across one year (March 2020 – April

2021). The lessons learned from this experience then inform a broader initiative for continuous improvement to the library's chat service.

## **Literature Review**

Service quality is often a primary concern with chat reference (Barrett & Pagotto, 2019). Determining a plan for training chat operators (whether operators are librarians, library staff, or students), and scheduling chat services - towards a goal of providing consistent service - often proves difficult (Shepherd & Korber, 2014; Yang & Dalal, 2015). Furthermore, competencies pertaining to chat need to be considered as learning outcomes for the training process (Luo, 2007). At the core, chat operators need to have strong reference and research skills training and may even benefit from a mentor / mentee approach; i.e., pairing a new chat operator and a seasoned reference librarian (Barrett & Greenberg, 2018). Chat services should be reviewed and updated often and buy-in and ownership of the service by its operators is critical to quality (Buljung & Johnson, 2017; Fuller & Dryden). Skills and competencies for chat operators include strong communication skills, knowledge of reference works and sources, ability to use the technology (chat platform), and the capacity to deal with the unexpected (Barrett & Greenberg, 2018). Furthermore, it is important to consider that library chat user behavior is determined by both the actions of the chat operators as well as users' awareness and perceptions of chat, acceptance of the technology, and its overall convenience and usability as a service (Mavodza, 2019).

Ideally, training for chat operators might consist of in-person (and recorded, for later review) workshops, the development of agreed-upon best practices for chat, and refresher materials discoverable online in, perhaps, a LibGuide (Hunter, Kannegiser, Kiebler, & Meko, 2019). Training documentation is particularly important as new hires typically do not join the

library at the same time and one-on-one training for chat operators requires a greater time commitment from already busy librarians than does a group training session (Farrell & Leousis, 2017, Mavodza, 2019). A training program for graduate student library assistants at McGill University, Canada, for example, consisted of methods of conducting a proper reference interview, orienting students to the library, making users aware of different catalogues, databases, and library resources, training on the features of the chat platform, and thirty hours of time spent shadowing experienced librarians while they provided reference services (Canuel, Hervieux, Bergsten, Brault & Burke, 2019). Chat transcripts can also help guide training for chat operators by providing ready-to-hand examples of what does and does not work well from real life examples (VanScoy & Oakleaf, 2007; Jacoby, Ward, Avery, & Marcyk, 2016).

While reference librarians treat patron texts as actionable information requests and attempt to satisfy these requests by providing the appropriate deliverables, some libraries train chat operators to offer a friendly greeting at the beginning of the interaction and a warm closing at the end of the transaction as indicators of excellent customer service (Zemel, 2017; Lux & Rich, 2016). Such conversational language in the digital arena can be crucial to making the interaction feel more relational as opposed to transactional (Pyburn, 2019, Dempsey, 2016). The “personalness” of chat interactions (such as engaged conversation) rated highly for users in a study at McGill University Libraries, too, especially for distance education students (Mawhinney, 2020). Utah State University Libraries discovered that, with chat, when body language and other contextual cues are missing, it becomes critical to promote approachability and friendliness via choice of words (Eastman, Hyde, Strand, & Wishkoshi, 2019). Chat operators can also positively reinforce information-seeking behaviors that patrons express and allow patrons to help “drive” the search to reinforce active learning (VanScoy & Oakleaf, 2007).

To make a chat interaction feel more conversational, a chat operator typing, “sure, no problem!” makes the interaction feel less formal and using a word such as “unfortunately” at the beginning of a statement is considered to be sympathetic and tempers any less than ideal information that is forthcoming (Keyes & Dworak, 2017). Often the patron’s understanding of higher quality library service via chat is dependent upon language and tone (Jacoby, Ward, Avery, & Marcyk, 2016). However, attention should be paid to the chat interaction becoming too informal, as a reference exchange should maintain some aspect of professional formality (Langan, 2012). To this end, when Florida State University reconsidered their chat service, they focused on a virtual reference training program that emphasized empathy and emotional intelligence in the virtual environment (Wharton & Mann, 2020).

It is also important to consider who is operating chat and the effect it has on the user experience. In other words, do librarians, library staff, and students all provide equal levels of service? Realistically, many academic libraries have discovered that there is not enough time for librarians to serve in chat for extended hours per day, given their regular duties, so students can be brought up to “good enough” with proper training and librarian supervision (Lux & Rich, 2016; Canuel, Hervieux, Bergsten, Brault & Burke, 2019; Cabaniss, 2015; Farrell & Leousis, 2017; Barrett & Greenberg, 2018). Staffing chat to meet user needs can be determined relative to the student population and observed service usage patterns (Barrett & Greenberg, 2018). At Bowling Green State University, for example, librarians and library staff comprise the regular chat schedule but students cover the chat service in the evenings and on weekends (Rich & Lux, 2018).

When non-librarian chat operators are confronted with questions outside their areas of knowledge, they can refer those questions to librarians who do have expertise in those areas or

who liaise to those departments (Armann-Keown, Cooke, & Matheson, 2015). In fact, well-trained undergraduate student assistants in the library can staff chat as a viable option (Keyes & Dworak, 2017). Graduate students, too, staff chat and can refer higher-level reference questions to a librarian (Cabaniss, 2015). It is also valuable to train chat operators as to when they should refer a user to a specific librarian or service and perhaps create a checklist to reduce moments of ambiguity when deciding to refer a user (Fuller & Dryden, 2015).

In a study undertaken by the New York University Libraries, 36% of the chat transcripts analyzed showed referral activity, meaning that the chat operator consulted with others (i.e. a student or library staff member seeking assistance from a librarian) prior to returning to the user with an answer, demonstrating a collaborative approach to chat (Smith, Conte, & Guss, 2016). In some more uncommon instances, such as library consortia, chat operators from outside the library respond to users' questions effectively, too; chat transcripts reviewed in this study indicated that users were only dissatisfied with the service they received after the chat operator revealed that they were from outside the library – not necessarily from the quality of the help they received (Barrett & Pagotto, 2019). And, with consortia, the chat service needs to be assessed from the perspective of all member libraries (Barrett & Greenberg, 2018).

Academic libraries have experimented with proactive chat widgets that pop up within a library's discovery layer in the catalog. Proactive chat may be a uniquely effective way to engage library users at their point of need as the questions asked in the pop-up chat widget proved to be more research oriented and less based on borrower services, tech assistance, or directional questions (Blizzard, 2018). Proactive chat also increases number of users and perhaps even the depth of questions asked (Hemp, Ellis, & Maloney, 2015). The depth of questions may, of course, necessitate the need for additional librarian engagement to assist library staff or students

operating chat, but that mirrors models traditionally supporting physical service desks. A known issue with proactive chat, however, is that the pop-up can interrupt typing while a user is searching the catalog – this can be particularly annoying to librarians or other in-house users of the library and represents something that must be managed in the settings for the app (Rich & Lux, 2018). A pop-up chat on the libraries' home page might help mitigate the issue of interrupting users searching the catalog, but may result in less in-depth questions and follow a bit too closely a retail model for the desires of the academic library (Fan, Fought, & Gahn, 2017; Fan & Welch, 2016). However, it can help to have the chat box on the library's home page to virtually greet the user when they click on the library's home page, thereby promoting one of the library's most valuable services (Yang & Dalal, 2015).

Chat services can be a logical and economical solution to budget reductions (Armann-Keown, Cooke, & Matheson, 2015). A study following a trend from 2006-2014 demonstrated that the use of chat has increased over time (Cote, Kochkina, & Mawhinney, 2016). As online classes become more popular - either as a teaching model or as a direct result of COVID-19 - libraries have a role to play in making the students' online experience more robust and offering initiatives to keep the academic library central to the college experience (Peters, 2018). In fact, the technology of chat provides synchronous communication beyond the confines of library walls and building hours while the virtual nature of the chat model helps ensure equitable access to library assistance, regardless of a user's physical location (Yang & Dalal, 2015; Chesley, Lowe, & Puzier, 2020).

As it pertains to physical library closures as necessitated by the COVID-19 pandemic, McGill University Libraries did report an increase in the number of virtual reference questions received as well as an increase in the length of those interactions online, particularly around



midterms and finals (Hervieux, 2021). Similarly, the College of Staten Island Library reported an increase in the use of virtual services related to pandemic closures and moved to alter the schedule to include longer virtual shifts for chat operators and the method of monitoring their chat queues in order to provide better targeted service to their users (Garvey, 2021).

## **Background**

The University of Alabama (UA) Libraries in Tuscaloosa, Alabama, USA, are comprised of five campus branches and support a student community of over 38,000 undergraduates (as of 2017, 2018, and 2019). It has achieved R1 status, “very high research activity,” in the Carnegie Classification of Institutions of Higher Education. UA is a four-year, doctoral-granting university and offers more than 70 undergraduate programs in 12 colleges and schools. Reference services are considered a priority toward the libraries’ directive of ensuring that “faculty and students have in-depth awareness of resources available, skills to evaluate them, and a desire to pursue life-long learning” (University of Alabama University Libraries, 2021).

The University of Alabama Libraries subscribe to Springshare which includes the LibChat platform, although up until March 2020, it was not in active use. A module in Springshare, LibAnswers, has an email component that the UA university libraries have branded Ask-a-Librarian, plus the LibChat component. While the Ask-a-Librarian electronic reference service (email) had been available to users for years - often providing immediate responses to incoming questions - the COVID-19 pandemic and the associated closure of the physical library buildings for the period of mid-March through early-July 2020, necessitated the prompt implementation of the live chat to serve as a proverbial lifeline and virtual service (reference) desk for library users.

## **Launching the Service**

### *Initial Setup of the Chat Service*

Spring Break on the UA campus, a holiday period not only for students but also for faculty and staff, was scheduled for the week of March 16-20, 2020. However, due to the serious nature of the COVID-19 pandemic, the campus extended the spring break period for an additional week and moved all classes online as of March 30. Students were asked not to return to campus after the break. During Spring Break week, the campus moved to a status of limited business operations, and the University Libraries were closed. Faculty and staff did not receive the extra week of spring break, so we started working from home during the second week of the students' extended break. The week following Spring Break was a turbulent period, as library administrators, librarians, and staff worked out the implications of closing the physical buildings, set up regular communications and work assignments for employees now working at home, and continued to provide support for campus teaching faculty who were suddenly transitioning their courses to online-only.

By March 30, 2020, the first day of the newly-online classes, the Libraries had plans in place to replicate current services to students who now found themselves in an entirely online environment. That evening, the Dean of Libraries requested the implementation of a chat service to virtually replace the in-house service desks. Because UA was a Springshare subscriber, the tools were already in place, and less than 24 hours later, the live chat service was operational. While this came down to the equivalent of "flipping a switch" to activate the chat system, faculty and staff had not yet used the platform, at least not during their time at the UA Libraries. Oversight of the service was assigned to the two department heads who supervise the subject liaisons (Director of Branch Library Services and the Head of Gorgas Information Services), and it was those groups of librarians who covered the service the first week, with little or no advance

training. It is worthwhile to also note that the Head of Gorgas Information Services started in his position on April 1, 2020, so we were bringing the chat service online as he was coming into a new job wherein he had not yet set foot on campus (and would not until June 2020).

### ***Bringing Librarians and Staff on Board***

With the physical library buildings closed, and no one on site to even answer the phones, a means to allow users to communicate with librarians and staff was needed immediately. Because everyone was working from home, training on the system was highly individualized. During the first week, librarians were encouraged to conduct practice chats with each other to learn how to navigate the system. As staff members began to participate, one of the department heads or a staff supervisor would do a practice chat or log in to the system and share a chat to show the staff the parts of the screen and the different functions. This comprised the bulk of chat training in the first few days after the system went live. On the Monday of that week, the Coordinator of Creative Media and Instructional Design Librarian shared a 6-minute video he had created to show the basic functionality of the LibChat system. He also shared an annotated screenshot of the chat screen and a link to a relevant Springshare training video. Additionally, on that Monday, a listserv was created to allow everyone to communicate about chat issues with the whole group. The listserv quickly became a useful tool for requesting swaps or coverage when chat operators were not able to cover their shifts.

Zoom became the primary method of communication for librarians and staff in the University of Alabama Libraries during the work-from-home period of the pandemic. However, for some staff and librarians, learning to use Zoom, let alone chat, provided some unique obstacles particularly because Internet connectivity and WiFi were not consistent depending upon the person's physical home location. Chat was also brought online during a time of great

uncertainty, given an unknown trajectory of the pandemic, an unknown return-to-campus date, and the unprecedented nature of the COVID-19 shutdowns worldwide. Our recognition that there was an inability to recapture a workshop-like environment for training on chat also resulted in more responsibility on the part of managers and department heads to practice with their direct reports and to address questions as they came up in a learn-while-you-operate chat situation. Furthermore, the Director of Branch Library Services and the Head of Gorgas Information Services logged in often and also reviewed chat transcripts and offered feedback to chat operators.

The chat schedule was adjusted multiple times during the first week and eventually reflected the hours that the physical buildings had been open. The widget for opening a chat session was originally located only on the Libraries' web page where the Ask-a-Librarian email service was offered, but by the end of the week there was a widget prominently featured on the Libraries' home page and on the Libraries' page in the campus intranet. Facebook and Twitter posts declared that "Librarians are available to assist you right NOW," and included the link to the Ask-a-Librarian page. The decision was also made to incorporate circulation staff from all library locations into the schedule (with the exception of the special collections library). During the work from home period, circulation staff were largely asked to focus on chat as it was akin to their serving at the service desk and it was, in a few cases, the only non-site-specific activity they could do from home. Whereas librarians could pivot to work from home more easily, for staff it was not always such an easy transition (Decker, 2021). With the chat hours finalized, the staff supervisors worked with the librarian supervisors to create assigned shifts to cover the hours. The schedule was initially set up to have one librarian and one staff member in each shift (again,

to aid with training support and accountability), and this new schedule was launched at the beginning of the second week on Sunday, April 5.

With campus policies and procedures for navigating the COVID-19 landscape changing and evolving almost daily, the library administration created a LibGuide for current policies during the pandemic. Chat operators were encouraged to rely heavily on this LibGuide to provide information to patrons on issues such as returning library books, overdue fines, and so on. Chat operators were reminded about various tools for answering basic questions, including the library website and our discovery service, and all chat operators were encouraged to refer advanced reference questions to the appropriate subject liaison. While not as robust as face-to-face training, the COVID-19 LibGuide did offer a useful quick-start guide to what we had anticipated might be frequently-asked questions.

### ***Return to Work***

The next phase of the chat service occurred when staff began returning to work on campus. On June 22, 2020, staff began their return on a part-time, phased rollout, which led quickly to regular full-time weekday hours onsite. (Library opening hours were curtailed at first, even though staff had returned.) Librarians continued to work from home. During this period, staff and librarians were paired for most chat shifts, and service was offered seven days a week, with shorter hours on the weekends.

The Fall 2020 semester saw major changes to the staffing and scheduling for chat shifts. The chat schedule once again mimicked the regular building schedules. Most staff work daytime hours only, and those staff working nights or weekends were not able to cover chat while also doing their regular assignments. Therefore, the chat schedule was separated into two primary sections: weekday daytime hours to be covered by staff, and evening and weekend hours to be

covered by librarians. Shifts were typically assigned on a permanent basis for the entire semester, but weekend shifts were assigned to a rotation, with a pair of librarians for each weekend. Early weekday shifts, Thursday evening shifts, and weekend shifts were staffed by one person, but all other shifts had two persons assigned. Daytime shifts were two hours, and most staff worked two shifts per week. Evening shifts were 2.5 hours, and each librarian worked one; the weekend rotation cycled through twice during the semester, so each librarian had two weekends. Weekend chat coverage was a total of 12 hours, with the librarians dividing it however they wished. Staff were now partnered with other staff, and librarians partnered with other librarians.

The Fall model proved to be effective, and it was carried through to the Spring 2021 semester. After examining the number and pattern of transactions during the weekends, weekend chat service on Sunday was reduced by two hours, making the chat service available for 10 hours on the weekend with librarians continuing to cover these shifts on a rotating basis. During this semester, the Director of Branch Library Services began to develop an internal LibGuide to support the service with tips and instructions for the successful operation of the chat service. Given the reliance on the COVID-19 LibGuide, the chat LibGuide seemed a necessary bolster for faculty and staff operators continuing to navigate chat with little formal training.

### **Analysis of First-Year Transactions**

To gain a better understanding of our chat services during the first year of implementation, we collected the statistics on the service, including transcripts of the sessions, from the LibChat software, coded the transcripts and analyzed selected characteristics of the sessions. These statistics included elements such as date, time, name of chat operator, name and email of patron (if provided), and location of chat widget used by the patron. In order to focus on those sessions where our librarians and staff engaged with users, we eliminated chat sessions

where the patron asked a question but did not subsequently respond. We divided the statistics into three time periods: the early implementation period and subsequent summer session (March 31, 2020 - August 15, 2020), the Fall 2020 semester (August 16, 2020 - December 19, 2020), and the Spring 2021 semester (January 7, 2021 - May 1, 2021). These periods ran 20 weeks, 18 weeks, and 16 weeks, respectively. The initial period covers the early phases of the service when the schedule and staffing were being adjusted and staff were learning how to use the system; the later periods correspond to the regular academic schedule when the service had become a regular component of the library's service offerings. Altogether, this constituted a look at the first full year of the service. Table I shows the level of usage during each period. In the first period, we saw an average of 17.9 chat transactions per week; in Fall 2020, that number increased to 28.6 chat transactions per week. Finally, in Spring 2021, we saw an average of 23.1 chat transactions per week. We also examined the weekly distribution of chats across each period, but we were unable to discern a noticeable pattern of activity. It is not surprising that numbers would be lower in the initial period when the service was new and fewer students were in class. The higher numbers in Fall 2020 followed by the drop in Spring 2021 could be explained by the campus environment, with more students than usual studying remotely during the Fall semester and then beginning to return to campus in the subsequent Spring semester.

#### Table I

We reviewed the transcripts of the chat sessions and recorded various characteristics. Queries that were somehow related to the situation with COVID were flagged so they could be counted. None of these questions were about COVID itself, such as infection rates or number of deaths in the state, but rather navigating changes in library procedures that had been made due to

the pandemic. In the first period, these questions were related to the library's being closed in response to COVID (e.g., how to return library books when the physical buildings were closed and the book drops were sure to be full). In the Fall 2020 semester the library introduced a reservation system, which also generated some questions from patrons (e.g., how to reserve a specific seat in a particular building). We found that 21.5% of the questions in the initial period, 21.2% of the questions in the Fall 2020 semester, and 14.4% of the questions in the Spring 2021 semester were related to COVID and related library procedures. We were surprised that the number was so low, and we interpreted this to mean that our patrons continued to need assistance with research and library services regardless of the pandemic. From the outset of the chat implementation, we anticipated that our users would have more COVID-related questions, and we assumed that since we had brought our chat service online to serve as a "virtual service desk" as a direct response to COVID, our users would likewise ask us a much larger percentage of questions pertaining to the newly implemented pandemic library use procedures. By and large, what our users requested was what they would have needed regardless of the pandemic; the chat service merely opened a line of communication for reference questions that would have been otherwise thwarted by the library building closures.

True to the nature of the questions we were accustomed to receiving at the service desks, we also categorized the chat sessions as reference or directional. Essentially, a session was considered reference when the patron was seeking information about a topic or publication (e.g., I need three peer-reviewed articles on my subject); a session was considered directional when the patron was asking about a physical location or instructions on how to do something (e.g., how do I print from library computers?). If both types of questions occurred in the same session, the session was coded as reference. As shown in Figure 1, there was a preponderance of directional



questions during the initial period, but in later semesters this somewhat evened out. Reference questions constituted 36.0% of the transactions in Late Spring/Summer 2020, 47.0% of transactions in Fall 2020, and 43.6% of transactions in Spring 2021. A possible explanation for the slight drop in reference transactions from Fall 2020 to Spring 2021 would be that students who had studied remotely in Fall 2020 were beginning to return in Spring 2021 and visit the library in person.

Figure 1.

Another element examined was the difference in transactions answered by librarians and staff. Table II shows that the relative numbers in each group were very close and stayed fairly consistent throughout the year. However, the number of transactions handled by each group changed from the first period, Late Spring/Summer 2020, to the second period, Fall 2020. During the first period, librarians and staff were paired and covered shifts together, whereas in Fall 2020 and Spring 2021, librarians were paired with librarians, and staff with staff, due to the staffing model as explained above. These results seem to indicate that the librarians took the lead in responding to chat requests when they were paired with staff, and staff did not begin to participate significantly until the change in scheduling made this imperative.

Table II.

Table III provides some insight into the types of questions answered by the staff and librarians. In the first period, when librarians were responding to chat sessions more frequently

than staff, they answered most of the directional questions and the bulk of the reference questions. However, once the schedule was altered so that staff did not have librarians working with them, staff participation took on more importance. In both Fall 2020 and Spring 2021, staff answered more of each type of question than librarians, perhaps because they were staffing the service during daytime periods. With staff answering more reference questions than librarians, proper training is essential. We observed a need for training in best practices, including warm interactions with users and ease in referrals, as well as internal practices such as scheduling etiquette.

Table III.

We explored the question of how often tickets were made from the chat sessions. A ticket is made in the Springshare software when the chat transcript is converted to a question in the Ask-a-Librarian queue. This queue is monitored by the liaison librarians, and each librarian responds to questions related to their own assigned subject areas. Staff do not participate in this process. Tickets can also be assigned to a specific person, if it is clear who should answer the questions. In the case of the chat sessions, tickets were created - by both librarians and staff - as a way of referring patrons and questions to someone with specialized expertise. For example, questions about the holdings and services of the special collections library were converted to tickets and assigned to that library's email reference service. Questions related to lost books and fines were converted to tickets and assigned to the appropriate circulation supervisor. The chat operator might also choose simply to refer the user to the appropriate person for follow-up help without actually creating a ticket.

Table 4 shows the number of sessions that were completed by the chat operator and the number of sessions that included a referral or resulted in the creation of a ticket. Chat operators were able to complete the user request in about three-quarters of the sessions throughout all three periods. There does not appear to be a strong difference in the use of referrals and tickets during the first period, when the librarians were answering most questions, and the later periods, when both staff and librarians active responded to queries.

Table IV.

Finally, Table V displays how users connected to the chat service. A chat widget was initially installed on the Ask-a-Librarian web page, and subsequently added to the Libraries' home page and the library tab in the campus intranet. Some librarians also loaded the widget inside their LibGuides (library guides on the Springshare platform). The Ask-a-Librarian page offers an FAQ with a search box, a link for submitting a question by email, and the chat widget. According to Table V, the largest share of chat users connected to the service using the chat widget upon an initial visit to the Ask-a-Librarian page. The second largest group used the library home page, while some connected from the campus intranet. A few users searched the FAQ first, then use the chat service, while only a small number connect from inside a LibGuide. The predominance of the usage of the Ask-a-Librarian page could be the result of the robust social media campaign at the beginning of the pandemic that pointed to this page. This social media campaign used Facebook, Twitter, and the Libraries' home page to communicate the availability of our virtual services (including chat, Ask-a-Librarian, etc.) during the period that the library buildings were closed.

Table V.

### **One Year Post-Chat Implementation**

In April 2021, a year after the live chat service was initially launched, the Director of Branch Library Services, the Head of Gorgas Information Services (GIS), and the Associate Dean for Research and User Services discussed the current state of chat and shared anecdotal feedback collected from chat operators. A subject liaison expressed interest in participating in a periodic review of reference service. That interest helped expedite the formation of a group to oversee the continuous improvement of chat (and other) reference services. Membership in the References Services Group included the Director of Branch Library Services, the Head of GIS, the Associate Dean for Research and User Services, the Science and Engineering Librarian (who had expressed the initial interest), and the Research and Instructional Services Librarian. The group began meeting monthly to oversee best practices, training, and assessments of the chat and other reference services.

The Associate Dean for Research and User Services, the Director of Branch Library Services, and the Head of GIS also collaborated to create a best practices handout meant to serve as a helpful guide for chat operators (see Appendix). The handout is expected to evolve over time and in direct response to questions asked by chat operators. The first face-to-face chat training for staff took place just prior to the beginning of Summer I Semester, on May 24, 2021. Interestingly, because the campus mask mandate was lifted during that day, the first session was conducted with masks on and the second one was not. A video recording of one of the sessions will serve as a refresher for those who attended in person and a training for those who are newly onboarded staff serving as chat operators.

A questionnaire was used to assess each session and provide feedback for future workshops. Responses provided the References Services Group with information about the issues chat operators are having and ways to improve chat training overall. For example, session attendees stated that they learned about the various tools and functions within our discovery service, they still have questions about creating tickets, and they would like to learn more about both general procedures and the discovery service.

On July 20, 2021, the References Services Group offered a chat training for librarians. This involved one session, lasting one and a half hours, wherein librarians were offered an opportunity to ask their questions about chat and then participated in a small group activity to evaluate an anonymized chat transcript and consider with their peers how the interaction could have been improved for the benefit of the chat user. Less time was spent on the chat platform itself, and enhanced attention was put on the open-ended discussion analyzing the curated and anonymized chat transcripts. Librarians appreciated the opportunity to share their experiences with their colleagues and learn interesting ways to deal with different situations that arise.

### **Future Directions**

While the University of Alabama Libraries brought LibChat online in response to an emergency pandemic situation, it is a service that has become part of the reference services repertoire. The newly-created References Services Group will oversee training toward continuous improvement as well as enhanced chat services documentation, in the form of best practices handouts, user guides, and the LibGuide. New hires will be given one-on-one training as well as access to the recorded training session(s) and a copy of the current version of the best practices handout. Required chat trainings for seasoned chat operators will be offered on a once-

per-semester basis and will include a refresher on the proper use of the chat platform, basic reference (search) skills, and methods for ascertaining what the user is seeking.

Historically, instruction services have received more of a spotlight than reference services at the University of Alabama Libraries. The References Services Group anticipates this cultural artifact diminishing over time with new emphasis on the live chat service and renewed attention directed toward all reference services. To encourage buy-in from librarians, the References Services Group will emphasize the need to record each chat interaction in LibInsight. While this represents an additional step to take upon completing a chat interaction, it provides important data which the Head of GIS collects and reports monthly in a document that is read by the Dean of Libraries. A few librarians have asked how their participation in chat might count in their annual reviews, which also provides another opportunity to emphasize the importance of recording accurate chat statistics. Collaboration and buy-in are necessary components of a robust and effective chat reference service for faculty and staff chat operators.

Collecting and reporting the monthly reference statistics not only provides important information about reference services, it also provides the background for what will relate to longer-term goals for reference services. As mentioned in the literature review section of this article, some libraries utilize students as chat operators, so a future chat staffing model at the University of Alabama Libraries will include student assistants as well. Following the literature, training is the most important aspect to ensuring that student assistants are successful in operating chat. And they can pick up time slots wherein librarians and staff are most busy.

## **Conclusion**

While this article details the quick implementation of a chat service rendered essential by the worldwide COVID-19 pandemic, the authors were surprised that only 19.3% of the questions

received via chat were directly related to COVID-19. Perhaps this demonstrates that library users were largely undeterred from pursuing their coursework and scholarly agendas despite the uncertainties and obstacles created by the pandemic. While the chat service had to be brought online quickly and without the rollout and training program we would have desired, subsequent months after a return to regular business operations have afforded us the opportunity to redouble our efforts to identify gaps in knowledge and training needs held by chat operators (both librarians and staff members) and design a training program accordingly. We are also working this semester (Fall 2021) to pilot a small program incorporating a select group of student assistants into our chat rotation after training and when partnered with experienced chat operators. The need to develop a cohesive training program led to the development of a References Services Group which, in addition to developing training for current chat operators and plotting a course for chat operators who will be brought on after the pandemic crisis, will also be instrumental in developing an assessment plan to understand the efficacy of our virtual and in-person reference services, something that the Libraries have excelled at on the instruction side but need to develop for the reference services side. While the COVID-19 pandemic was unexpected and disruptive, it forced the issue of bringing a live chat service to our users and served as a virtual service desk during the critical months that the Libraries' buildings were physically closed.

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## Appendix I

When a user arrives in the chat queue:

- Answer chat as soon as possible with a warm greeting, identify yourself, acknowledge receipt of question, and indicate your willingness to help.

Communication

- Chat reference is essentially a “reference interview” taking place online. Conduct an effective reference interview with clarifying questions.
- Let the user know that you are looking up the answer (do not just leave them waiting in the queue, be sure to let them know you are researching the answer as they cannot see you).
- Chat may be more casual as a method of communication, but do not use all caps, pay attention to spelling and grammar, do not use internet short hand phrases or acronyms, keep the conversation professional and limit your use of confusing library jargon.
- Ask open-ended questions and try to avoid yes/no questions to step the user through the act of finding the answer to their question.
- Ensure that you explain what sources you are using and what search terms you are using in databases and find out where and what they have already searched (if at all).
- Promote replicable search strategies by describing how you found the answer
- Make the communication two-way. Ask the user a follow-up question so they know you are tailoring the answer to their question as it was asked.
- Be careful when providing links to results – be sure to use the permalink from the catalog or Scout, not the link in the address bar.

Chat operator

- Bookmark pages frequently used (ex: UA Libraries’ home page) to reduce search time.
- If there is more than one user waiting in the queue, be mindful of not spending too much time with the first patron.
- Be patient with users who might be typing slowly.
- Only send one or two sentences at a time to avoid “information dumping” – try to keep it conversational.

Referrals

- If a staff member does not feel comfortable stepping the user through the research process, please refer it to the appropriate liaison librarian. For librarians who are asked a question well outside your area, you can refer the user to the subject matter liaison. For everyone, please ensure you do so warmly.
- If you refer a chat user to a liaison, please initiate a ticket and then please also contact the liaison directly to let them know.
- If you are referring to Hoole, please refer at [archives@ua.edu](mailto:archives@ua.edu), not to a specific person there. Please also give the chat user this email so they can follow up if need be.

Problems with Users

- Try to establish a communication based on mutual respect.

- You do not have to tolerate abuse.
- Do not tolerate offensive, obscene, or racist language.
- Report incidents to your supervisor so that they can consider blocking the user's IP address.
- If a direct threat is made to you or the library, call UAPD (205) 348-5454.
- Try to give a warning to modify any problematic behavior and then, if the behavior continues, you may disconnect.
- Obscene language: set boundaries by telling the user that the session will be ended if those words continue to be used. (Ex: Please don't use that kind of language, I will be happy to move forward with your question provided that you refrain from using such words"). If you are not comfortable telling them to stop using that language, you can simply close the session.
- If a user imitates the session with inappropriate language, do not engage or respond. Again, let your supervisor know.

#### End of Session/Shift

- Before closing, ask the user if your session has completely answered their question. If they indicate that it has not, ask what else you might be able to do to assist.
- Always send a sign-off, closure message, even if it appears that the user has already signed off.
- As the end of your shift approaches, please stay online with the user long enough to properly finish the session or ask your colleagues logging into their shift if they do not mind the transfer of the user to them (and be sure to let the user know if you are initiating a transfer to another chat operator).
- You are responsible for chat requests that come in right before the last minute of your shift.

#### Resources

IFLA Digital Reference Guidelines <https://www.ifla.org/publications/ifla-digital-reference-guidelines> [Accessed 04/29/2021]

MacPhaidin Library. 2021, March 15. The Basics – Monitoring Chat: Reference Basics LibGuides at Stonehill College. [https://libguides.stonehill.edu/monitoring\\_chat](https://libguides.stonehill.edu/monitoring_chat)

QuestionPoint / 24-7Policies [questionpoint.blogs.com](http://questionpoint.blogs.com) [Accessed 04/29/2021]

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