RHN Annual Meeting 4/26/2013

Instruction in Chat: Notes from discussion of chat transcripts

Signals that the patron is open to instruction
- Asking *how* to search, or *how* to improve a search term: showing desire to learn how to do it
- Lots of participation or engagement, including reiterating instructions, reporting on their search results.
- Describing steps they have taken so far, and what they are stuck on.
- Volunteering "I am new to Internet research" – inviting librarian to help with learning.
- The patron mention the assignment is due in a month (time to learn and serious approach.)
- Patron commenting on his/her own insecurity "I am a perfect dunce…" "searches make me feel stupid" giving signals for reassurance and guidance
- Thanking librarian for instructions and suggestions.

Signals that the patron is *not open* to instruction
- Showing impatience. Just wanting an article, not to learn how to find articles
- Disappearing as soon as instructions were given.
- Patron using "thank you" as an attempt to disengage, may indicate being done with instruction (politely).
- Patron using what seemed to some like sarcasm or making condescending comments.
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Librarian behaviors that *facilitate* instruction or student learning
- Using a conversational approach
- Starting with a phrase like "Let's begin" to indicate the librarian and patron would be working together.
- Checking for understanding with a phrase like "does that make sense?"
- Before giving instructions, using the phrase, "a couple of tips…" to warn that info was coming.
- Breaking information/instructions into chunks, not sending all at once.
- Offering prompts like "just take your time" to reassure the patron.
- When the patron asked for a specific title, the librarian described step by step instructions, didn't just send a link.
- When a student was obviously overwhelmed, the librarian offered information one step at a time, leading the patron to the next steps in searching only when the patron was ready.
- Asked student about their topic, and modeled how to expand the topic.

<u>Librarian behaviors that *do not facilitate* instruction</u>
- Not explaining what he/she was doing.
- Ignoring or missing patron prompts and questions.
- Not responding to the exact question asked, but instead offering a link without checking to see if that would help the patron.
- Using jargon and truncation without explanations.
- Sending lots of information without checking whether the patron is following or even still there.
- Missed an opportunity to suggest contact with the local librarian/subject specialist.
- Missed an opportunity to answer a "how" question.
- Problematic sequencing of instructions, such as explaining search terms in detail, and only then asking if the patron knew how to choose a database.

Instruction in Chat – Selected References

Desai, C. M., & Graves, S. J. (2008). Cyberspace or face-to-face: the teachable moment and changing reference mediums. *Reference & User Services Quarterly*, *47*(3), 242–254. http://blog.rusq.org/2010/01/03/cyberspace-or-face-to-face-the-teachable-moment-and-changing-reference-mediums/

Chat patron responses to survey questions:
- "I wanted the librarian to teach me how to find the information myself"
  Definitely: 55%
  Would be nice: 27%
  Didn't care: 15%
  No way, find it for me: 3%
- "The librarian showed me how to find the information for myself"
  Yes: 71%
  Sort of: 15%
  Not at all: 14%
- "I learned something about how to find what I was looking for"
  Yes: 77%
  Sort of: 15%
  Not at all: 8%

Devlin, F., Currie, L., & Stratton, J. (2008). Successful approaches to teaching through chat. *New Library World*, *109*(5/6), 223–234. doi:10.1108/03074800810873579

The authors reviewed "best" chat transcripts that showed evidence of student engagement, and used these examples to develop best practices for engaging in instruction during chat reference:

(1) Discover what the student already knows – get him to describe what he has already done to start the research process.

(2) Build search strategies with the student – let the student initiate suggestions and come up with ideas and then help to build a search strategy.

(3) Aim for student independence – whenever possible, guide the student through the process. Do not do it for them.

(4) Be as descriptive as possible – describe each process step-by-step.

(5) Ask questions during each step of the conversation.

(6) Ask the student to describe what he is finding and how it will help with his research.

(7) Check back frequently to make sure the student understands and is following along. Make the student as comfortable as possible – use humor and face-saving techniques.

(8) Build confidence in the student – use praise often.

(9) Give the student the opportunity to critically evaluate the information he is finding – is it scholarly, peer-reviewed or popular culture?

(10)   Do not leave the student hanging with a referral – get his contact information and help him make the connection to a subject specialist.

Ellis, L. A. (2004). Approaches to teaching through digital reference. *Reference Services Review*, *32*(2), 103–119. http://libstaff.library.vanderbilt.edu/ISAG/virtref/Approaches%20to%20Teaching%20Through%20Digital%20Ref..pdf

This study examined VR transcripts for evidence of instruction related to ACRL information literacy standards. The author suggests that virtual reference "levels the playing field" in terms of providing patrons with more control of the experience than in in-person interactions with a librarian.
Recommendations:
• Develop user-centered learning objectives for teaching in reference.
• Librarians should be "demonstrative and explicit" in chat because of the high potential for miscommunication.

Gronemyer, K., & Deitering, A.-M. (2009). "I don't think it's harder, just that it's different": Librarians' attitudes about instruction in the virtual reference environment. *Reference Services Review*, *37*(4), 421–434. doi:10.1108/00907320911007029

Reports on a survey of librarians' attitudes toward providing instruction during VR chat. Majority of respondents agreed that:
• VR patrons are looking for quick answers
• VR patrons want to learn to search for themselves
• It's more difficult to do a good reference interview in chat than face-to-face
The authors suggest that the VR setting "shifts the control of the reference interaction away from the librarian" to a more equal encounter, which may account for some of librarians' discomfort with this new setting.

Recommendations for VR practices that make transactions more user-centered:
• Ask if patron would like to be shown how to do something
• Don't jump ahead of the patron by sending several instructions at once
• Leave a window open and give the patron an opportunity to come back and ask a new question.

- Alert the patron to what you are about to do (go away and do some searching, send a long block of text, etc.)
- Include a reference interview.

Nilsen, K. (2006). Comparing users' perspectives of in-person and virtual reference. *New Library World, 107*(3), 91–104. doi:10.1108/03074800610654871

Patron willingness to return to virtual reference service after a transaction was *negatively* influenced by:
- The librarian by-passing the reference interview
- Unmonitored referrals: referring the patron to a source or service without confirming that it will help
- Failure to ask follow-up questions