



# Delaware Virtual Reference Services Manual

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STANDARD GUIDANCE AND PRACTICES FOR DELAWARE'S  
VIRTUAL REFERENCE SERVICE, ASK A LIBRARIAN DELAWARE

Ask a Librarian Delaware

DELAWARE DIVISION OF LIBRARIES

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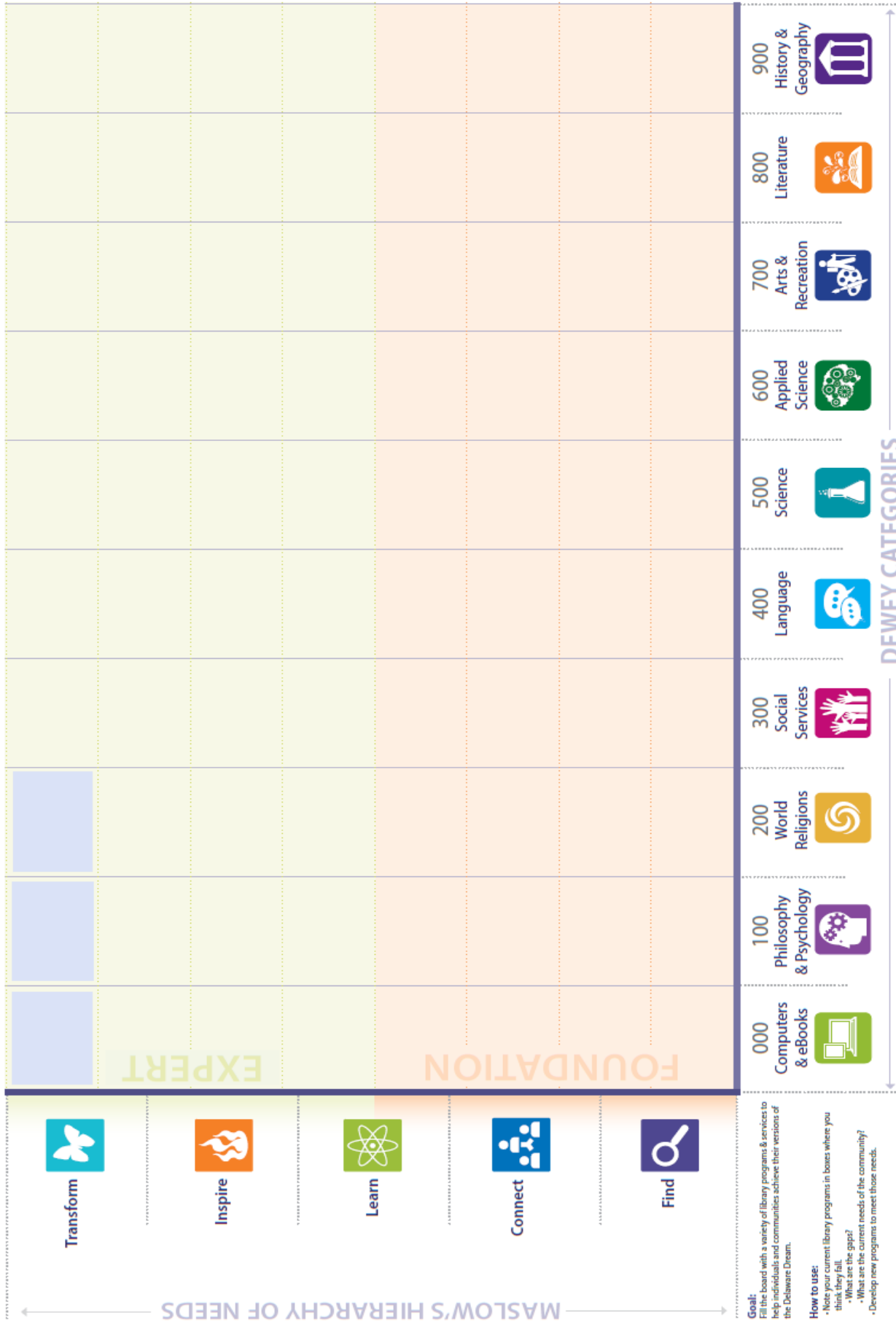
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# Delaware Libraries Connections



**Goal:** Fill the board with a variety of library programs & services to help individuals and communities achieve their versions of the Delaware Dream.

**How to use:**

- Note your current library programs in boxes where you think they fall.
- What are the gaps?
- What are the current needs of the community?
- Develop new programs to meet those needs.

*Tablet that the library is a transformational force in records that is director related to their level of funding.*  
 - OCLC Good the Library report, 2011

## DEWEY CATEGORIES

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## Section 1: Culture of Ethics and Service

Professional ethics and values have been, and will continually be of utmost importance in maintaining the democratic society and all-inclusive environment we strive to cultivate within Delaware libraries. These foundational principles guide our ability to serve in the capacity of library professionals. As human beings, members of society and our respective communities, and *especially* as library professionals, we have a choice to make each and every day. That choice is to uphold ethical values and contribute to the “greater good” of society<sup>1</sup>. Please review the links below for further information.

- [ALA Code of Ethics](#)
- [IFLA Code of Ethics](#)

## HUMAN RIGHTS AND LIBRARIANSHIP

It is of the utmost importance that we practice our librarianship skillset from a perspective in which human rights is paramount. We serve our patrons equally, without regard to race, ethnicity, sexual orientation, gender expression, religion, physical ability, or any other potential delineating factor. The most miniscule task serves as a touch point to our patrons, and therefore should be conducted with care and respect for both the action and, more importantly, the person whom we are assisting; this holds true for in person and virtual interactions. As a reference service provider, you facilitate patron journeys toward personal agency, independence, and self-actualization.

We inevitably reject the idea of neutrality when conducting our jobs from a human rights perspective. Librarians are advocates for the marginalized, minority, unpopular, and difficult voices within society. It is our duty to assert our commitment to these voices

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<sup>1</sup> As mentioned by Michael Gorman in Chapter 3 of [The Portable MLIS](#) (Haycock & Romaniuk, 2008).

and support the vision of true information equity. For further information, please review links below.

- [Library Bill of Rights](#)
- [The Universal Declaration of Human Rights](#)

## THE VIRTUAL REFERENCE SERVICES CULTURE

Virtual Reference Services helps facilitate transformational opportunities for all patrons. This duty is fulfilled by staff valuing patrons and their needs, thereby creating a culture of service. This manual details the intricacies of that culture. The guidelines for behavioral performance for reference and information service providers can be found on the [main RUSA website](#).

Although reference services continue to evolve, the foundational principles remain consistent. The Theory of Reference Service by the renowned S. R. Ranganathan states that reference service is the most important library work and the hub of all its practices<sup>2</sup>. As such, we are a valued piece of the greater library whole, as we serve as the face for most patron interactions.

### FOCAL POINTS

Reference has two focal points-*instructional* and *locational*. Together they ensure all patrons have equal access to reference resources and specialists regardless of personal circumstance. Regardless of their locations, our patrons deserve excellent

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<sup>2</sup> From the Institute of Education Sciences, found [here](#).

help and expect consistency in how we provide customer service. When they reach out to us, we meet them where they are.

## Instructional

- Helping patrons learn, one-on-one, using subject specialists/subject matter experts when appropriate
- When providing instruction/information to patrons, it is imperative that staff:
  - o Leave personal views at the door when you come to work (ethics of the profession).
  - o Do not provide legal, medical/health, or tax advice.
  - o Look for opportunities/ways we can embrace in the moment or develop to become aware of a way to overcome an assumption or prejudiced idea.
  - o Process, if any, for how, when, and who to refer deeper level questions, such as those that require a subject specialist.
  - o Utilize staff training procedures whenever needed to help grow in question-answering with remote (virtual) customers.

## Locational

We need to meet patrons where they are. The traditional physical interaction is still very much important, and it should be viewed as a learning opportunity for the patron as well as a chance to showcase the library's many programs and resources that may meet the patron's specific need. However, online and virtual interactions are equally important and quickly becoming the most prevalent form of reference interaction. This is achieved through Ask a Librarian Delaware (AaLDE) through the LibAnswers platform hosted by Springshare.

- Online interactions (email, social media, texts, etc.) are unique in that they allow for a more personal connection in a short amount of time.
- Voicemail inquiries are also categorized as virtual communications. It is imperative that we treat them in the same manner as general web tickets. Provide internal notes with updates of progress, i.e., after returning the patron's call, and if necessary, moving interactions online using an email provided by the patron.

By focusing on maintaining a culture of service, we are better able to assist patrons with finding the best resources for their specific need.

## Section 2: Knowing Available Resources

The Delaware Division of Libraries (DDL) has a vast, and ever-growing, amount of useful resources. The list below is a small snapshot of what is currently offered to help provide answers to patron tickets. For the most up to date list of available resources, visit the [Reference LibGuide](#). You should also stay well-informed of what is offered within your specific library.

### DDL RESOURCES:

- **Ask a Librarian Delaware Staff Support Site:** this is a one-stop-shop for the latest guidance and resources concerning the AaLDE site, as well as resources to help answer patron inquiries
- **Consortium Libraries List:** a list of all libraries within the Delaware Libraries Consortium (DLC)
- **DDL eMedia Page:** access the wealth of electronic resources using the links to the vendors' websites

- **Delaware Library Access Services** (formerly, the Delaware Library for the Blind and Physically Handicapped): this service provides resources in accessible formats in Braille and audio books for the blind and physically handicapped residents of Delaware.
- **Delaware Library Catalog**: search the inventory of all items (including Library of Things materials) available from libraries in the Consortium; there is also the [DLC mobile app](#) for on-the-go access
- **FAQs through LibAnswers**: use the tab on the Ask a Librarian Delaware site dashboard (Answers > FAQs) or the patron portal page to search through the available Frequently Asked Questions; these can be hyperlinked in patron responses
- **LibGuides**: organized via the Dewey Decimal system, LibGuides are useful for providing patrons accurate and succinct information about a specific topic

**The Professional Development for Delaware Library Staff LibGuide > Patron Assistance 000 > Reference - CORE:** This link is provided upon request

- *...And so much more!*

## SUBJECT MATTER EXPERTS

There may be times when an inquiry involves a topic that you are not well versed in. These are prime opportunities to utilize the *subject matter experts* available within Delaware Libraries. **The Reference Services Listserv** is a quick way to inform the Reference Services team as a whole of the inquiry. This method allows you to receive pertinent and invaluable assistance from reference staff across the state. Their combined expertise and experience will oftentimes provide a quality answer for the patron.



## Section 3: Effective Communication with Patrons

There are three main types of reference assistance:

1. Assisting or providing instruction with using library resources and/or devices
2. Identifying library materials most suited to meet the patron's need
3. Providing factual answers to direct questions, such as contact information, program/event times, etc. These inquiries usually are quickly resolved, as the information is readily located.

All of these require a similar approach, referred to as *The Art of Reference* or, more commonly, *The Reference Conversation*<sup>3</sup>. This concept lays out the most appropriate method for answering patron inquiries, regardless of their type or format. For more information on the Reference Conversation, please review the [guidelines](#) provided by the Reference and User Services Association (RUSA).

### THE REFERENCE CONVERSATION

## GREETING

The greeting sets the tone of the dialogue between the library representative and the patron. It should be friendly, approachable, and welcoming. It should also follow the tone set by the patron; if the patron is more professional toward you, reciprocate that same tone.

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<sup>3</sup> You may hear some librarians refer to a “reference interview.” This is an antiquated label, as it does not speak to the interactive nature that is imperative when assisting patrons with their inquiries. Therefore, when conversing on this subject, it is highly preferred to use the most current, and accurate, terminology, *The Reference Conversation*.

- Personalization is paramount, as it not only establishes a quicker connection with the patron, but it also helps them realize they are not talking with a robot. Refer to the patron by their name (if it is provided), and as you become more familiar with their inquiry, you can implement new knowledge into your replies.

## CLARIFICATION

Clarification sets the expectation for resolution. Paraphrase what you believe the patron is asking, and allow time and space for their feedback. This will ensure you are providing their exact needs instead of assuming you know what they are.

- This applies for simple as well as complex/multi-part questions. If you are unsure what is being asked, ask for assistance from staff or a subject matter expert in the field of inquiry to assist.

## RESOURCE SELECTION

Prioritize using DDL online resources (LibGuides, Ask a Librarian Delaware FAQs, e-Media resources, etc.) and your library's specific resources for answering questions. If you do venture outside of DDL resources, be sure the resources you provide are professional and age appropriate. Also, do your best to ensure the validity of the source. For criteria for choosing and evaluating online resources, please review "Evaluate your sources – Guidelines" content on the Ask a Librarian Staff Support Site's [resource](#) page.

- It is imperative that you always uphold the [principles of intellectual freedom](#) as outlined by the ALA.

## FACILITATING THE SEARCH

Explain your search process and describe your findings. Let the patron know where you are looking for the answer and your overall process. This keeps the patron engaged and a part of the process, instead of a mere bystander. We want to “teach one how to fish” as opposed to merely “giving the fish.” If possible, provide the patron with the resource you are viewing, either via a link or an attached file. For printed resources, offer them the option to check out the item at their preferred library.

- If the inquiry needs to be referred to another librarian or a subject matter expert, provide the patron with their name and contact information. If you are the recipient of a transferred inquiry, start with an introduction and a re-clarification of the question before proceeding.
- Avoid using acronyms and explain any complex terminology or processes. Be proactive in ensuring a clear response for the patron.

## CHECKING WITH THE PATRON

Ensure the patron’s needs were met by following up. Simply ask something along the lines of, “Is there anything else I can do for you?” or “Does the information I gave you completely answer your question(s)?”

## CLOSING

Close your response in the same tone as the greeting. Include a thank you for using the service and for supporting DE libraries, invite them to use the service again, and include your personal signature, if you have one. Also, provide proper analytics for data collection/metrics (detailed in section 4).

For more information regarding the reference conversation, please review the tutorial, [Ask a Librarian Delaware: Learning Best Practices, Part 1](#), within the Delaware Library Staff Academy (DLSA).

## BEST PRACTICES FOR TEXTS, CALLS, AND SOCIAL MEDIA RESPONSES

Texts, voicemail messages, and social media responses require the same level of engagement and professionalism as the more traditional email response. However, the communication between you and the patron can occur in real time. Responses via the web form or email are asynchronous; patrons are not expecting an immediate reply. This is not the case for texts, calls, and social media replies. As such, more clarification is provided.

## SOCIAL MEDIA COMMUNICATIONS

Chatting through social media is synchronous, and therefore requires frequent contact and quick responses. It lets the patron know you are a human (not a bot), and that you are fully engaged with their question.

- Generally, try to respond no later than 10 minutes of receiving notification. The patron is most likely awaiting your response in real time, so the sooner your reply, the better.
- In the initial reply, provide your name and request their identifying information (preferred name, preferred pronouns, etc.)
- During the conversation, try to keep intervals between responses no longer than 45 seconds, so as to ensure the patron they have not been disconnected.
- Although conversing on social media is a more informal means of communication, do not neglect spelling and grammar checks.

- Break up long responses into shorter entries. This avoids long pauses, and it gives the patron an opportunity to begin reading your response while you are still completing it.
- If the question is complex and can't be resolved within a short chat message, try to provide a time estimate, or offer to move the conversation to email or in person. Examples of responses include, "I will continue to search for an answer and I will send you an email within X hours or minutes"; "Is this enough to get you started?" "May I send you an answer via email?"

## TEXT COMMUNICATIONS AND CALLS

Texts are unique in that they require the same level of customer service as other responses, but there is most often a text/character limit. Also, conversations are somewhat synchronous; patrons may be eagerly awaiting an answer, or may have sent a text/posted a question and stepped away, thereby not anticipating an answer for several hours, or for the rest of the day.

- Generally, try to respond within 5-10 minutes of receiving notification that the patron has sent a new reply. This most mimics an average text conversation.
- Questions are generally simple, ready reference questions that can be answered fairly quickly. For more in depth questions, texts can be used as an opening to an email or in- person conversation.
- Try to keep answers short, as patrons tend to prefer brief responses and also may be charged for each message received. Use abbreviations, shorten URL links, and eliminate unnecessary words. Also, avoid using your signature block, as it takes up unnecessary space.
- There is no need for constant interaction with texts. The patron may not have unlimited texting. Continue to work toward finding a resolution for their inquiry, and when you have one, then respond.

- If it will take hours or days for a resolution to their inquiry, complete a reference conversation and let them know you are working toward an answer, but it may take a day or two.
- If you claim a text ticket, you will receive any responses from that ticket for a 24-hour period. After this time, a new ticket will be submitted. If this occurs, be sure to merge tickets so as to avoid duplicates.

When a patron leaves a voicemail, the first task is to listen to it and decipher what it is they are truly asking. At times, patrons start off with one request and end the voicemail with a completely different inquiry. Once you have gathered what the patron needs, you can begin researching the answer/solution.

- When you call the patron back, the conversation will either be synchronous or not. If you reach the patron, great! You can relay your findings to them directly, thus creating an organic connection and avenue to share other resources available. If your call results in their voicemail, you will need to state the following:
  1. Greeting
  2. Your name, and that you are a liaison for Ask a Librarian Delaware
  3. Your associated library
  4. The date and time you are calling
  5. Your message regarding their ticket
  6. The best method for them to reach you back (the Ask a Librarian Delaware phone line, or your associated library, depending on the need)
- It is imperative that you include an internal note (preferably, although using Create a Reply is acceptable) detailing the voicemail message and the steps you took to resolve the ticket (e.g., "called patron back and left a voicemail with the information requested & my library phone number"; "spoke with patron and

renewed their library card"). Be sure to include the patron's name, library card number, and phone number.

## Section 4: Providing Analytics

The Reference Analytics field *and* the Tag field in tickets that come through the Ask a Librarian Delaware interface should be filled out when submitting a response to the inquiry. This data is used for LSTA reporting; incomplete fields result in inaccurate statistics, which directly affect resource availability and funding!

- Please review the training tutorial, [Engaging With Library Patrons Using LibAnswers \(Ask a Librarian Delaware\), Part 2](#) (starting at 11:19) within the Delaware Library Staff Academy for more information concerning proper tags and analytics.
- You may also review the metrics regarding the Reference Analytics on the [Ask a Librarian Delaware Usage and Service reports](#), posted on the [Ask a Librarian Staff Support Site](#).

## Section 5: Professional Development

The Delaware Division of Libraries (DDL) takes a systematic approach to the continual education of library staff. This stems from the core belief that, in order to support life-long learners, one must be a life-long learner. As Kathy Graybeal, retired head librarian of the Sussex County Libraries states, "if staff is indeed the lynchpin of superior service, their personal and professional growth must be a priority<sup>4</sup>."

There are numerous sources to support professional development for Delaware library staff. All library staff who participate in professional development should record their participation using the [Professional Development Achievement Tracker](#).

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<sup>4</sup> From the Professional Development Introduction video, recorded during the June 2014 Library Town Meeting.

- The [Professional Development LibGuide](#) is a comprehensive wellspring of information. Tabs are categorized using the Dewey Decimal System, and the latest information and tutorials are displayed prominently on the home page. You can also access archived webinars and read reviews of previously held trainings.
- Tutorials created specifically for Delaware library staff in the areas of Customer Service, the Dewey/Maslow Framework, Cataloging, Circulation, Collection Development, Programming & Partnerships, Reference, and more are available through the [Delaware Libraries Staff Academy](#). The first time you select a tutorial, you will be prompted to create an account. Once your account has been created, you will gain full access. Tutorials are added regularly.
- The [DDL calendar](#) on LibCal also details professional development that DDL sponsors. Please direct all questions about professional development to [profdev@lib.de.us](mailto:profdev@lib.de.us). You can also suggest continual education opportunities directly, via the aforementioned email.

## Section 6: Additional Resources

Below is a list of external resources to assist with reference services. These should be reviewed and used in conjunction with the internal resources listed in Section 2 of this manual. Please note them for future use.



- The Reference and User Services Association main website
- Library of Congress Global Reference Network Digital Reference Service Guidelines Draft
- The Library Toolshed

For further information or suggestions to improve this manual, please reach out to the Professional Development Reference Team via [profdev@lib.de.us](mailto:profdev@lib.de.us).

