



*Evidence Summary*

**Quality of Online Chat Reference Answers Differ between Local and Consortium Library Staff: Providing Consortium Staff with More Local Information Can Mitigate these Differences**

**A Review of:**

Meert, D.L., & Given, L.M. (2009). Measuring quality in chat reference consortia: A comparative analysis of responses to users' queries." *College & Research Libraries*, 70(1), 71-84.

**Reviewed by:**

Laura Newton Miller  
Science & Engineering Librarian,  
Carleton University  
Ottawa, Ontario, Canada  
Email: [laura\\_newtonmiller@carleton.ca](mailto:laura_newtonmiller@carleton.ca)

**Received:** 17 Nov. 2009

**Accepted:** 24 Jan. 2010

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**Abstract**

**Objective** – To evaluate the quality of answers from a 24/7 online chat reference service by comparing the responses given by local and consortia library staff using in-house reference standards, and by assessing whether or not the questions were answered in real time.

**Design** – Comparative analysis of online chat reference transcripts.

**Setting** – Large academic library in Alberta, Canada.

**Subjects** – A total of online chat reference transcripts from the first year of consortium service were analyzed for this study. Of these,

252 were answered by local library staff and 226 from consortia (non-local) library staff.

**Methods** – A stratified random sample of 1,402 transcripts were collected from the first year of consortium service (beginning of October to end of April). This method was then applied monthly, resulting in a sample size of 478 transcripts. In the first part of the study, responses were coded within the transcripts with a “yes” or “no” label to determine if they met the standards set by the local university library’s reference management. Reference transaction standards included questions regarding whether or not correct information or instructions were given and if not, whether the user was referred to an authoritative source for the correct

information. The second part of the study coded transcripts with a “yes” or “no” designation as to whether the user received an answer from the staff member in “real time” and if not, was further analyzed to determine why the user did not receive a real-time response. Each transcript was coded as reflecting one of four “question categories” that included library user information, request for instruction, request for academic information, and miscellaneous/non-library questions.

**Main Results** – When all question types were integrated, analysis revealed that local library staff met reference transaction standards 94% of the time. Consortia staff met these same standards 82% of the time. The groups showed the most significant differences when separated into the question categories. Local library staff met the standards for “Library User Information” questions 97% of the time, while consortia staff met the standards only 76% of the time. “Request for Instruction” questions were answered with 97% success by local library staff and with 84% success by consortia. Local library staff met the “Request for Academic Information” standards 90% of the time while consortia staff met these standards 87% of the time. For “Miscellaneous Non-Library Information” questions, 93% of local and 83% of consortia staff met the reference transaction standards. For the second part of the study, 89% of local library staff answered the questions in real time, as opposed to only 69% of non-local staff. The three most common reasons for not answering in real time (known as deferment categories) included not knowing the answer (48% local; 40% consortia), technical difficulty (26% local; 16% consortia), and information not being available (15% local; 31% consortia).

**Conclusion** – The results of this research reveal that there are differences in the quality of answers between local and non-local staff when taking part in an online chat reference consortium, although these discrepancies vary depending on the type of question. Providing non-local librarians with the information they

need to answer questions accurately and in real time can mitigate these differences.

### **Commentary**

Online reference chat has become an increasingly popular way to meet patrons’ reference needs. As patron expectations of service grow, libraries are exploring ways to save time and money, using existing resources to benefit the most people. The decision to join a consortium chat reference service can be a difficult one, because many librarians are concerned about the ability of outside staff to answer their users’ questions successfully. But what is a “successful” transaction? The researchers discuss the challenges regarding “success” and “quality” in terms of library versus user perspectives, and in virtual versus traditional reference desk transactions.

Meert and Given have developed a new measure for assessing the quality of a chat reference transaction by determining whether or not correct information was provided in real time and if not, whether patrons were provided with an authoritative source for the correct information. What is “correct” may be up to interpretation, as sometimes there are several ways to answer a reference question (especially regarding Category Three, “Request for Academic Information”). It is easier to measure “correctness” in the other, more factual categories, although interestingly, this was the category where both local and non-local library staff appear to be almost equally competent in answering questions.

The researchers discuss some of the issues and concerns in the literature regarding the in-person reference desk transaction and the online chat interaction. In this study, librarians in both groups did not answer some of the questions in real time because they did not know the answer. This could be characteristic of certain questions in general. With this in mind, Meert and Given point out that it would be interesting to examine whether or not there are differences in answering questions in real

time on the physical reference desk compared to in an online chat service.

The researchers suggest that more local user information provided to non-local staff may allow them to answer these types of questions more easily and in real time. Since the time that the research was conducted, an information page was created to offer non-local library staff information about facts, policies and procedures that were not being answered correctly or in real time. This need to be more familiar with, or have access to, information about library procedures, policies and records raises some interesting concerns for a local library. For example, some libraries may have only internal access to certain policies and procedures (i.e., on a staff intranet). It may not be an issue for some kinds of information to be shared, but how much personal information should an external librarian know about a local user? Privacy and legal concerns would require that during times when consortium librarians are staffing the chat reference service, they would only be able to guide users to personal information,

not have access to it themselves. For example, a consortium librarian could provide steps to reset a personal identification number (PIN) but not be able to give out the user's actual PIN.

Great care was taken in the selection of transcripts and preparation of data to easily repeat the study in another context. It would be useful to repeat this study with the same library and consortium to ensure that the measures put in place since the study (providing more local information) actually help the non-local staff meet the reference standards. It would also be valuable to repeat this study with another local library and consortium arrangement to validate the findings. Academic libraries can incorporate this research into their own decision-making processes when analyzing the pros and cons of joining an online consortium, and any library that uses online chat to provide reference will find the standards set up by this particular library's management beneficial in maintaining the quality of chat transactions.